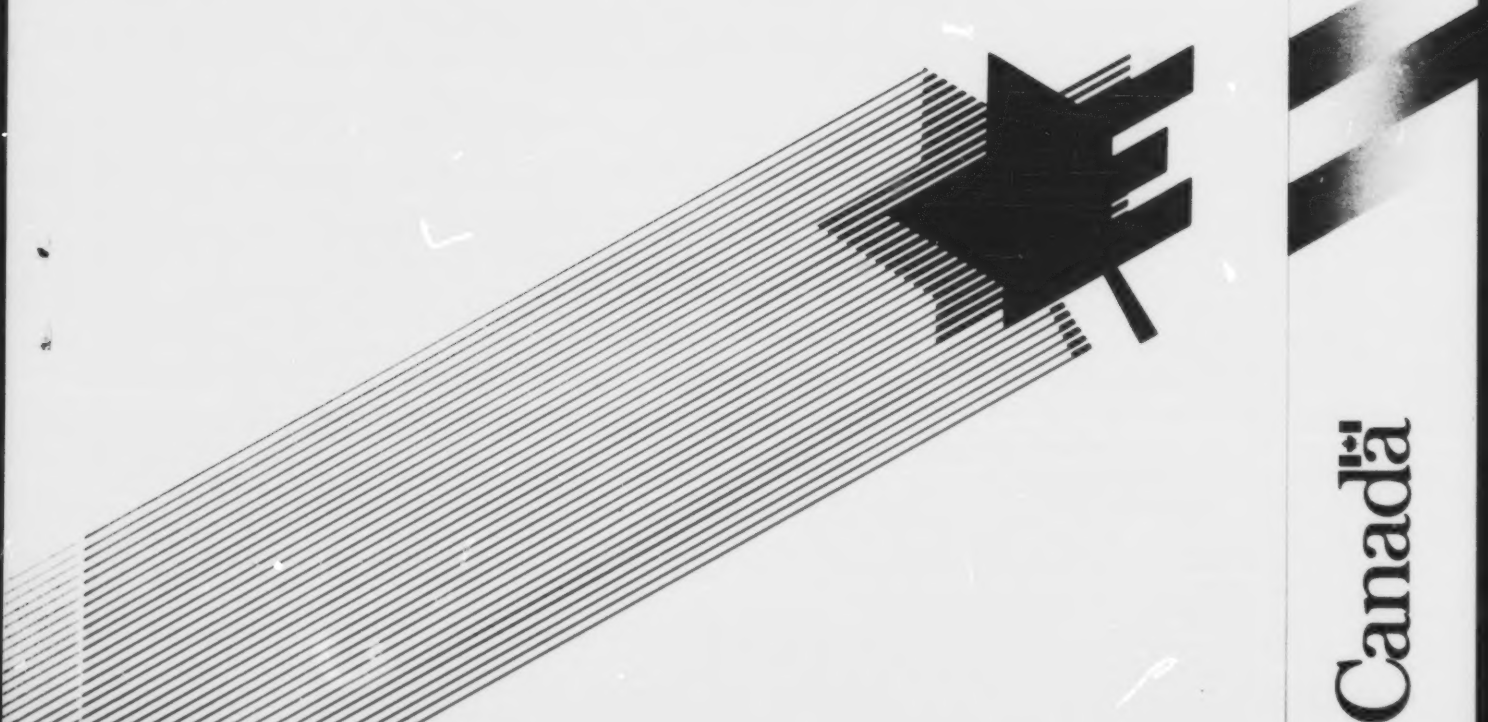
External Affairs and
International Trade Canada

Tourism Market Profiles - US and Overseas

Travel Trade & Consumer Shows



Canada

92-04088/

TOURISM MARKET PROFILES - U.S. AND OVERSEAS

This document has been prepared by External Affairs and International Trade Canada (EAITC) to assist the Canadian tourism industry seize potential opportunities afforded by the Free Trade Agreement with the United States and other growing Overseas markets.

This brochure is designed as a reference to provide an overview of the various territories including market segment profiles and potential for Canadian tourism product development.

For further information we encourage you to communicate directly with the Canadian Embassy or Consulate identified in this document or contact:

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* Ce document est disponible en français.

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CANADIAN CONSULATE GENERAL/TOURISM

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Tourism Personnel

Nigel P. Godfrey, Consul & Trade Commissioner

Saverio (Sam) Paglioni, Tourism Marketing Manager

Barbara Bach, Commercial Officer (Tourism), Tour Operators, Travel Agent, Specialty Markets, and Media.

Mary Louise Goodie, Commercial Officer (Tourism), Meetings, Conventions and Incentive Travel markets.

Territory Served by the Atlanta Consulate General are:

Alabama
Florida
Georgia
Mississippi
North Carolina
South Carolina
Tennessee
Puerto Rico
U.S. Virgin Islands

Population 1990 figures estimate SEUS population at 44 million people.

The Atlanta Post territory covers an area of 346,214 square miles, an area slightly smaller than the Province of British Columbia yet containing approximately 16% of the total U.S. population. While the Southeast is substantially more rural/agrarian than the U.S. as a whole (59% of the population is urban versus 79% for overall U.S.), its economic diversity more than compensates for this seemingly ~rural~ statistic.

The states in the post territory have a number of major cities including Miami, Atlanta, and Charlotte; numerous centers of excellence (academic, R & D); high-tech and manufacturing industries; and a large service base. For these reasons, as well as a moderate climate, the South during the 1980s has been one of only two regions of the nation to gain more residents than it lost through internal U.S. migration, slightly edging out the Western U.S. in net increase.

According to a recent survey by Fortune magazine, Georgia was one of the biggest net gainers of Fortune 500 companies to move into the state, capturing 8 new corporate headquarters for the reporting year of 1988-1989. All together the SEUS is home for 32 of the largest industrial Fortune 500 corporations (see Appendix A for complete breakdown).

Significant developments in the territory include the selection of Atlanta, Georgia as the site of the 1996 Summer Olympics, which has and will continue to increase media and business attention on the Southeastern United States. Also, Holiday Inns and United Parcel Service have recently moved their corporate headquarters to Atlanta.

Stats at a Glance

. 1988-1989 Average Unemployment rate for the territory: 5.7%
. 1988-1989 Average Population Growth rate for the territory: 4.6%

Alabama	$12,604	North Carolina	$14,128
Florida	$16,546	South Carolina	$12,764
Georgia	$14,980	Tennessee	$13,659
Mississippi	$10,992	Puerto Rico	$ 4,301
		U.S. Virgin Islands	$ 7,465

Assistance available from the post

Market intelligence	Sales leads/referrals
Counselling to travel industry	Joint promotions/seminars
WIN Tourism Database	
Assistance in coordinating activities in territory	

Assistance not available from the post

Co-op advertising support
Response to critically short lead times

CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN TERRITORY

TRAVEL TRADE/SPECIALTY MARKETS

Touring/City

The absence of direct air routes to Canada from much of the post territory, especially Atlanta, is the largest constraint to tapping market potential for Canada as a destination. Scheduled service is good from Florida, which represents the greatest leisure travel market potential for Canada. American Airlines recently inaugurated nonstop service from Nashville to Toronto, which means that the territory can expect more business from Tennessee.

North Carolina represents the second greatest area of potential leisure travel to Canada. In the motorcoach segment, there are more tour operators active to Canada from NC than from any other southeastern state. Traditional destinations are eastern Canada and the Canadian Rockies.

Lack of consumer advertising in the Southeast is a concern in the touring/city market, and all segments for that matter.

Outdoor/Adventure

There is excellent potential for market development in this particular segment in the Southeast. The most popular outdoor trips are drive trips, fly-drive, and fly-in. Most persons travel as individuals or in private 3-5 member groups; organized club trips usually include ten or more passengers; trip duration is a minimum of 1 week, maximum of 3. Typically the smaller groups book through travel agents. The larger organizations book on their own. Trips are planned 6 months out.

Sixty-five outdoor clubs are located throughout the Southeast, especially in the larger urban areas of Georgia, Tennessee, and North Carolina. The Atlanta CONGEN has identified approximately 30 outdoor shows, among them a dozen or so fishing shows as venues to tap into this segment.

Ski Market

Potential and demand for Canada ski product in the Southeast falls into three areas: 1) organized public ski clubs offering membership to the general consumer, 2) private or business-related ski clubs, and 3) the general public.

The organized public ski groups is the largest area with 80% of the membership belonging to the 16,000 member, 30-club Crescent Ski Council (in NC, SC, TN, VA, KY) 8,000 member Florida Ski Council, and 5,000 member Atlanta Ski Club.

Eastern Canada trips are more popular than western Canada (with possible exception of Banff); competition from Colorado is fierce and air connections and knowledge or exposure to Canada's various ski destinations need improvement.

Private businesses with employee ski clubs represent a vast untapped potential; the same is true of the general public. Conservative estimates number potential skiers at 200,000. Eastern Airlines offers packages to Mt. Tremblant and Villa Bellevue from Atlanta, and Air Canada, Delta, and Canadian Holidays offer Eastern Canada successfully in Florida due to excellent air connections.

Some 50-70 ski clubs are on record with the Atlanta CONGEN and another dozen ski tour operators/wholesalers. Numerous venues exist in the Southeast for the promotion of ski product, including the Crescent Ski Council's annual convention, the Florida Suncoast Series, and Jerry Simon's SKIGROUP.
28.7%, from 233 to approximately 300. The number of tour operators actively selling Canada product increased from 98 to approximately 120, an increase of roughly 22.44%.

Currently the WIN database at the Atlanta Consulate stores information on 58 NTA tour operators, 37 of which are active to Canada; and 90 ABA tour operators, 58 of which are active to Canada. A survey is now in progress to complete the database.

There has been an increase in the number of retail travel agencies in the southeastern US. Between 1987 and 1990, the number increased from 3,525 to 4,204 or roughly 19%.

The 31-million member American Automobile Club with 154 affiliates recently moved its worldwide headquarters to Florida, a new market development that took place in November, 1989. Throughout the southeastern US, there are approximately 73 auto clubs.

Future Plans/Promotional Opportunities

The Atlanta Canadian Consulate General has identified market research an area of primary focus. To that end, a survey is underway to complete our inventory of tour operators and build a first-generation databank of information.

Current marketing and promotional activities include a $50,000 joint marketing agreement with Air Canada in the Florida market to tap into the Hispanic market and custom promotions to the group tour market, coordinated with select marketing partners, (i.e. travel agent fams and reverse marketplaces such as Rendezvous Canada, etc). We also support provincial and municipal initiatives.

The Atlanta CONGEN will hold a Spring product launch series this year. It will be held in Florida February 25-27, 1992. Seminars on the GST are also planned for 1992.

MEETING, CONVENTION, AND INCENTIVE TRAVEL

In this territory there are an estimated 1,200 companies with designated meeting planners, 400 national and international association headquarters, 100 incentive houses and numerous Fortune 500 headquartered companies such as Coca-Cola, Georgia Pacific, Holiday Inns, United Parcel Service, Equifax and Turner Broadcasting, to name just a few.

The Corporate and Association Markets

In our MC&IT Data Bank we have profiles on 1200 organizations, corporate and associations that plan some type of meetings. Through constant updating and the use of questionnaires, we have identified over 500 companies who have an interest in meeting in Canada, with 50 other companies indicating a definite interest in meeting in Canada (they have selected a city and plan to visit the city in the next three years).

In addition to the strong corporate market which prevails in the Southeast, the association market is amply represented, especially in the Research Triangle Park area located in Raleigh/Durham, North Carolina. This research complex is home to over two-dozen national and international associations, all capable of utilizing Canada for their meeting programs.

The Incentive Travel Company Market

The Southeast territory has a number of well known incentive travel companies which are consistent producers of programs to Canada. Included in this list are: The Chateau Group (based in Montreal), Osborne Incentive Travel, Carlson Marketing/E.F. MacDonald, Timco Travel, Maritz and Motivational Technologies. To maintain additional contact with this group, the MC&IT officer is the current Regional Chairperson of Georgia for the Society of Incentive Travel Executives (SITE).

MEDIA

In addition to editors of major media and daily newspapers, there are many specialty journalists in the Southeast, the all-important Cable News Network in Atlanta, and a major cable TV producer, GEOVISION, in Miami with 25 million viewers, 409 locations, and 36 Hispanic markets.

We are building a first-generation databank of media profiles (approximately 200).

Daily Newspapers

There are 24 newspapers with a circulation in excess of 100 million. The Atlanta post has had contact with 93 travel/feature editors. Major dailies include:

	Circulation
The Birmingham News, (AL)	181,000
The Advertiser, (AL)	52,000
The Florida Times Union, (FL)	160,000
The Miami Herald, (FL)	517,000
The Orlando Sentinel, (FL)	275,000
The St. Petersburg Times, (FL)	307,000
The Evening Independence (FL)	
The Tallahassee Democrat, (FL)	55,000
The Tampa Tribune, (FL)	275,000
The Atlanta Journal Constitution (GA)	255,000
(Sundays)	500,000
The Clarion Ledger, (MS)	73,362
The Charlotte Observer, (NC)	205,782
The News and Observer, (NC)	163,100
Winston-Salem Journal, (NC)	95,000
The State, (SC)	130,000
News and Courier, (SC)	75,000
The Commercial Appeal, (TN)	223,950
The Tennessean, (TN)	127,015
The News-Sentinel, (TN)	102,000
The Star, (Puerto Rico)	

Other Media

There are 2,004 AM and FM radio stations in the territory, and 248 television stations.

Freelancers

The Atlanta CONGEN has had contact with 195 outdoor writers/Photographers, and 32 general interest freelancers and photographers.

How We Assist

We provide editorial research assistance, photographs, and slides; and arrange media visits to Canada with complimentary airfare. We also participate in cooperative programmes with provinces and municipalities.

CANADIAN CONSULATE GENERAL/TOURISM

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Boston, Massachusetts 02116

Phone:	617/536-1731
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Fax:	617/262-3415

Tourism Personnel

Ralph Johansen, Senior Commercial Officer/Tourism. Supervises and is responsible for all promotional activities undertaken with the travel trade, meetings and conventions, outdoor/adventure and media sectors. Coordinates federal/provincial/territorial and private sector liaison to deliver the tourism program. Responsible for special projects, field intelligence.

Janet Aiton, Commercial Officer/Tourism. Overseas marketing and program activities for Travel Trade - tour operators, travel agents, airlines, auto clubs, group travel influencers; Seniors.

Cande Treadway, Commercial Officer/Tourism. Overseas marketing and program activities for Media; Outdoor/Adventure.

Linda Schmidtke, Secretary to Program Manager.

Wendy Diltz, Secretary to Tourism Commercial Officers.

Territory Maine, Massachusetts, New Hampshire, Rhode Island and Vermont.

Population 9.5 Million.

Historically, there are strong cultural and family ties between the five New England states and Eastern Canada, particularly Quebec and Atlantic Provinces. It is estimated that twenty-five percent of Vermont and New Hampshire residents have a French-Canadian heritage. There is also a strong level of awareness of Eastern Canada and an active generation of trade between the two regions. Massachusetts alone represents 60% of the New England population (excluding Connecticut), with close to 40% living in the metropolitan Boston area. Boston has experienced rapid growth in the 1980s and Massachusetts in particular fared well with low unemployment and the highest growth rate in the U.S. That phenomenal growth, though exhilarating, was clearly unsustainable. Readjustments are underway and the region is in for some slow years.

Other major markets are Providence, RI, Worcester/Springfield and New Bedford, MA, and Portland, ME. Even with a 7% unemployment rate as reported in November 1990 and an economic slowdown plaguing the region, Massachusetts remains economically important.

The New England states have successfully made the transition from manufacturing to a service-based economy. An early industrialization provided a pool of skilled labour and entrepreneurs. Universities have been a source of technologies, professional and technical manpower and entrepreneurs. The willingness to take a risk and availability of venture capital has facilitated start-ups. In recent years, the region has constantly scored above average on all economic indicators.

New England conservatism makes for a value-conscious and cautious buyer. The New England visitor of one or more nights stays three to four nights average and spends approximately $255.00. The majority (63%) are for a pleasure/recreation holiday and most visitors are repeat (close to 90%). Mode of transportation is 71% auto, 14% plane, and 8% bus. Half travel during July, August and September, with April, May and June a second choice. New England residents have an affection for active and passive outdoor/nature activities but touring remains their prime travel experience. The New England market is well positioned and mature. There is potential for future growth in the outdoors/adventure and meetings and convention markets as well as short stay travel. The over-55 age group is increasing and offers opportunities.

Assistance Available from Post

Market information; sales leads/referrals; joint promotions; counselling to the travel industry; assistance in co-ordinating activities in territory; MC&IT/Tour Operator data base; use of office facilities.

Provincial Tourism Bureaux In-Territory

Nova Scotia Information Office
Bob Boyd, Mgr.
136 Commercial Street
Portland, Maine 04101
207/772-6131

Ontario Ministry of Tourism & Recreation
Bob Adduci, Mgr.
4360 Prudential Center
Boston, MA 02199
617/266-7172

Quebec Tourism
Gabriel Biron, Mgr.
Exchange Place
53 State Street
Boston, MA 02109

Program Objectives

To actively promote Canada as a prime destination for corporate and association meetings.

To increase tour development activities through leading wholesalers and operators with a demonstrated potential for Canada.

To further develop the city/cultural/heritage market segment.

To directly influence favourable editorial coverage of Canada as a preferred travel destination.

To increase promotional activities aimed at the outdoor/adventure market segment, particularly to destinations offering a highly competitive product.

MARKET SITUATION/POTENTIAL

Meetings, Conventions and Incentive Travel

The New England territory is predominately a corporate market characterized by smaller size meetings but with a higher frequency of meeting. High tech, defense, banking and insurance are key sectors of the New England economy. There are twenty Fortune 500 Companies based in our territory. Associations located in the territory tend to be regional (few national) or state with smaller memberships and a strong inclination to remain within New England.

Our general assessment of this market is that the territory represents untapped potential for Canada, the extent of which remains to be determined.

Future Plans/Promotional Activities

- MC&IT site inspection program;
- Update MC&IT data base;
- MC&IT presentation 1 for Quebec, 1 for Atlantic Canada.

Outdoor/Adventure

New England represents excellent potential for outdoor products, both consumptive (fishing & hunting) and non-consumptive (adventure). New England fisherman tend to be interested in cold water fishery (trout & salmon), but there has been recent dramatic growth in bass fishing (warm water). Trends indicate a change from a backyard fishery to travelling further to pursue their interests. Fly fishing remains popular with an increasing emphasis on catch & release.

Three major Outdoor shows, Worcester, Springfield and Boston, reach a potential audience of over 400,000. The New England Outdoor Writers Association (list available) provides an excellent vehicle for exposure in this market. Adventure travel is a growth market. Trends towards comfort, comprehensive trips and educational/cultural trips in the adventure market offer opportunities.

Future Plans/Promotional Activities

- Increase data base - clubs & affinity groups;
- Visit Canada (Outdoor Media) program;
- Outdoor shows;
- Adventure travel initiatives.

Touring/City/Culture

The impact of the New England travel trade (carriers, operators, wholesalers, retail agents) on traffic flows to Canada represents roughly 20% to 25% of the total number of visitors from this region and appears to have reached a plateau. Reports from hotels in Canada and motorcoach operators in this market for 1991 indicate an increase in cancellation and a drop in load factors. Efforts are being concentrated in selling new Canadian products and destinations through the travel trade.

There are approximately 1200 travel agencies in our five-state territory and 55 Wholesalers/Tour Operators with Canadian programs. There are 36 American Automobile Association offices, two of which have motorcoach tour divisions. The 9 airlines servicing Canada from our territory are Air Canada, Air Alliance, Air Atlantic, Air Nova, Business Express, Delta Air Lines, First Air, Northwest Airlink and USAir. The two marine carriers are Marine Atlantic and Prince of Fundy Cruises.

Future Plans/Promotional Activities

- travel trade presentations and seminars with several U.S. and Canadian tour operators and airlines;
- Visit Canada (Trade) Program;
- product testing tours with U.S./Canadian operators;
- new product development activities;
- support the attendance of local tour operators to:
- Rendez-Vous Canada
- Bienvenue Quebec
- Alberta Marketplace.

MEDIA

An increase in contacts and a strengthening of our work with the media in New England, both print and electronic, continues. Since over 70% of visitors to Canada from this territory travel by automobile and by-pass the travel trade, and since we are no longer in the direct consumer business, we must at least maintain our share of the "rubber traffic" by increasing the visibility of Canadian products and destinations through enhanced PR activities such as the Visit Canada (Media) Program, Dateline Canada Media Day, interviews, talk shows, etc.

For many years this office has worked closely with free lance writers, authors and photojournalists, along with several major publications and electronic media outlets. Resulting editorial and publicity coverage for Canada has been excellent.

How we Assist

Assistance to the media is offered in the following manner:

1) Visits Canada (Media) Program:
    - financial assistance to visit a Canadian destination;
    - itinerary planning;
    - arranging editorial contacts/appointments;
    - coordination with provincial and city media officers.

2) Research assistance;
3) Providing photographs/releases from our library;
4) Joint promotions with provincial partners;
5) Selection and coordination of a New England media group to attend a major media marketplace organized by the Canadian Consulate in New York (March 1992).

Several newspapers have weekly travel sections and often feature Canadian articles. The major newspapers and their circulation:

The Boston Globe	811,000/Sunday
The Boston Herald	308,000/Sunday
The Providence Journal	264,000/Sunday
The Worcester Telegram	119,000/Sunday
The Springfield Union	163,000/Sunday
The Burlington Free Press	51,000/Sunday
The Portland Press	153,000/Sunday
The Bangor News	95,000/Sunday

In addition, there are:

78 daily newspapers; 417 weekly newspapers; 5 metro paper; 311 AM/FM radio stations, 32 commercial television stations; 41 cable television stations; and 126 regional publications.

CANADIAN CONSULATE/TOURISM

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Fax: (716) 852-4340

Tourism Personnel

Lynn Niederlander, Commercial Officer - Tourism, Responsibilities: Travel Trade, Media, Meetings, Conventions and incentive Travel, Auto Clubs, Ski Clubs.

Lisa Tarajos, Tourism Assistant

Territory Western, Central and Upstate New York (Counties of Chautauqua, Cattaraugus, Erie, Niagara, Orleans, Genesee, Wyoming, Allegany, Livingston, Monroe, Wayne, Yates, Ontario, Steuben, Chemung, Schuyler, Tioga, Seneca, Cayuga, Broome, Cortland, Onondaga, Oswego, Jefferson, St. Lawrence, Lewis, Oneida, Madison, Chenango, Delaware, Otsego, Herkimer, Montgomery, Fulton, Hamilton, Essex, Franklin, Clinton and Thompson)

Population 4 million.

Manufacturing, agriculture and high technology make up the economic base for the terrritory. High tech giants IBM, GE, Kodak, Zerox, Bauch & Lomb and Corning all have roots and major facilities in our territory. (See attached list of major employers.) Manufacturing employs 20% of all workers, versus 12% downstate and 15% in the nation as a whole. The work force is highly skilled. Due to high tax structure in the state, growth is predicted to be lower than elsewhere in the nation, but the diverse economic base makes for a stable economy.

Buffalo, the "Queen City of the Great Lakes" and the second largest city in the state after New York City, is undergoing an exciting renaissance. Areas such as transportation, finance/insurance, health sciences and high-tech industries have increased substantially over the past ten years. More than 400 Canadian businesses employing 15,000 people have taken advantage of Buffalo's relatively low labor and real estate costs, and 600 acres of prime waterfront development is expected to attract more. Buffalo will host the World University Games in 1993.

Located 60 miles east of Buffalo, Rochester is the wealthiest city in Upstate New York and the third largest city in the state. It boasts the corporate headquarters of Eastman Kodak, Xerox, and Bausch and Lomb and maintains a solid core of more than 1,000 smaller companies. It also has an abundance of higher education institutions such as the Rochester Institute of Technology and is nationally known for its health care facilities. Hosting the LPGA and the 1990 Open, rochesterians love to golf and ski, and are also culturally active. In the past ten years, Rochester's population has increased 2.2%.

Syracuse, located in the center of New York State, has been called "The Crossroads" due to the fact that New York State's two major interstate routes (90 & 81) intersect here. Syracuse boasts such major firms as General Electric, Carrier Corporation, Bristol-Myers, and Niagara Mohawk. Service industries such as finance, insurance and real estate are among the fastest growing sectors in the local economy. Many of the tour operators in our territory are located in the Central New York area.

Assistance Available from Post

Market intelligence
Joint promotions/seminars
Select profiles from WIN
Tourism database

Sales leads/referrals
Counselling to travel industry
Assistance in coordinating
activities in territory

CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN TERRITORY

Touring/City

We presently have 62 operators listed in our territory. Competition is forcing differentiation and some companies now work together and feed into each others' tours. Operators constantly seek new or uniquely presented destinations. At least five operators run their own annual group leaders' marketplace.

As for the city product, week-end trips continue their popularity. The "Phantom" and other theatre packages are best sellers, as well as sports packages including hockey and baseball. USAir flies from the three major cities in Upstate New York to Toronto, Montreal and Ottawa. Toronto is perceived of as a vibrant city with much to offer, but is thought to be expensive.

The proximity of the Toronto airport from Buffalo (one and one-half hours by car) makes all areas of Canada accessible. The Canadian Rockies and the Maritimes are often-requested destinations.

Outdoor/Adventure

There are four major sport shows in the territory and one ski show. Canadian exhibitors report good response from each. Post has been successful in working with members of the New York State Outdoor Writers' Association in promoting Quebec fishing and hunting. Ski clubs have potential for year-round adventure travel other than skiing.

MEETINGS, CONVENTION & INCENTIVE TRAVEL

There are eight Fortune 500 companies in this territory, but there is good potential for small corporate meetings close to the border or incentive getaways due to "middle management glut", where incentive awards take the place of promotions in motivating middle management or sales force.

In our MC&IT database, we currently have 253 profiles of companies with potential to meet in Canada. As for incentive travel, there are six incentive firms in our territory.

The Consulate has plans to host a "Canada Showcase" for meeting and convention planners in Buffalo on February 11, 1992, timed to facilitate travel for exhibiters in the marketplace sponsered by Quebec in Toronto on February 13. There will be a NEBS Seminar component for the exhibitors. Last year's "Canada Showcase" attracted 40 exhibitors and eighty guests and was very successful.

TRAVEL TRADE

There are 503 retail agencies in the territory, 16 auto clubs with 18 branches and 62 wholesalers/tour operators. Auto Travel Departments of the auto clubs have been very helpful in supplying numbers of "triptiks" done to Canada.

Future Plans/Promotional Opportunities

The Consulate will sponsor Canada Marketplaces for the travel trade in the Spring and Fall as follows:

March 16 - Syracuse
March 17 - Rochester
March 18 - Buffalo

Sept. 28 - Syracuse
Sept. 29 - Rochester
Sept. 30 - Buffalo

The spring marketplaces will feature a round-table seminar format for Canadian wholesalers to present to retail agents prior to the marketplace.

The Consulate contracts the support services of "The Meeting Company" to assist in the show organization.

SKIING

There are 65 ski clubs in the territory, most of which we have on profile sheets. The annual Syracuse Ski Show is one of the largest and longest running in the East. This area represents a good ski market for Canada, due to proximity to Quebec and to the Toronto airport for Western skiing departures. We have been successful in promoting both through media and ski club fams and promotions.

The Consulate works closely with Isabel Gil, Fair Gordon and Heather Fernandez in Toronto to promote Quebec skiing by sending ski club trip chairmen to "Rendez-Vous Ski Quebec" annually and by co-hosting an annual "Quebec Ski Night" in Rochester.

MEDIA

Daily Newspapers

We work closely with the travel sections of the following three daily newspapers:

	Circulation
The Buffalo News	315,252
The Rochester Democrat and Chronicle/Times Union	674,117
Syracuse Herald Journal	333,037

All three are associated with American Publishers Representatives in Toronto for advertising.

Other Media

The publications of the Buffalo, Rochester and Syracuse auto clubs have wide circulations among membership. A little known fact is that one can obtain advertising very cost-effectively by running ads in the three auto club publications. We have contacts for each. It has also proven beneficial to include publication writers on fams.

The local business publications, "Buffalo Business First" and the Rochester and Syracuse Business Journals, provide good opportunities for MC&IT advertising. "Buffalo Business First" runs an annual fall feature on meetings and convention sites.

The weekly papers in each of the three major cities offer circulations in affluent suburbs, and have cheaper advertising rates than the daily papers. These include "Bee Newspapers", in the Buffalo area, "Wolfe Publications" in Rochester and "the Syracuse New Times".

We have good relationships with several productive free-lance writers, many of whom have produced and published syndicated articles in the past. Some key free-lancers will be invited to "Dateline Canada" sponsored by the Canadian Consulate General in New York City in March.

Our office has an updated all inclusive print and electronic media list for the territory, including talk show hosts, promotion contacts and assignment editors. In addition, all media has been entered in the WIN Tourism Database.

Magazines

"The Buffalo Spree" magazine has an upscale readership and a circulation of 20,000. Their travel writer has produced excellent Canadian stories.

"Travelhost" magazines are published in Syracuse, Rochester and Buffalo and are distributed in hotel rooms. They offer potential for Canadian editorial and advertising, as does the "Welcome to Western New York" publication, which is similarly distributed.

UPSTATE NEW YORK MAJOR POPULATION CENTERS - 1990

Rank	Population (millions)	Media Income	Cities
1	1.188	26,156	Buffalo (& suburbs) Niagara/Lockport
2	.994	29,974	Rochester (& adjacent towns)
3	.656	27,509	Syracuse (& adjacent towns)
4	.318	23,329	Utica-Rome
5	.264	27,042	Binghamton Area
6	.094	22,945	Elmira Area

CANADIAN CONSULATE GENERAL/TOURISM

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Tourism Personnel

Bas Bouma, (Ext. 3500), Tourism Program Manager
- Overseas Media program
- supports Business Travel program
- prepares market analysis and forecasts
- officially represents the tourism program

Ross Ament, (Ext. 3503), Commercial Officer/Tourism
- program activities for meetings, conventions and incentive travel

Larry Kogut, (Ext. 3505), Commercial Officer/Tourism
- program activities for travel trade-retail travel agents (including Corporate travel agents), wholesalers, tour operators and transportation companies

Vacant, (Ext. 3504), Commercial Officer/Tourism
- program activities for outdoor adventure, automobile clubs, special interest groups; retail agents/outdoor adventure/American Automobile Association, tour operators/wholesalers-outdoor adventure; visual-aids, photo/slide library, lending program; newsletter

Lynn Shortt, (Ext. 3501), Administrative Assistant - Tourism

Sharon Woodworth, (Ext. 3502), Administrative Assistant - Tourism

Territory

The following states and regions are served by the tourism promotion program of the Canadian Consulate General in Chicago:

- Illinois, Wisconsin, Missouri
- Quad-city area of Iowa (Davenport/Bettendorf)
- Kansas City area of Kansas
- counties of Indiana, Jasper, Lake, La Porte, Newton and Porter in northwest Indiana

This territory constitutes one of the most important travel markets in the U.S. and a region of vital interest to Canada's medium term tourism development plan.

Over 22 million people reside in the region, which has a economy that is highly diversified and is base on the four pillars of agriculture, manufacturing, transportation and financial services. Although large cities such as Chicago, St. Louis and Milwaukee are dominant, nearly 1/3 of the population resides in cities of under 100,000. Per capita income for the region exceeded $17,000 in 1990. Large cities are demographically mature with population and employment growth occurring mainly in suburban areas, fueled by rural migration and immigration. Chicago and Milwaukee in particular have large and distinct ethnic minorities.

Canada, though a popular and a well regarded destination for visitors from our territory, is not particularly well known for its non-touring/outdoor products and attractions. As is true for many "border" areas, the volume business is in motor coach/private vehicle travel to Canada. The region, which suffered proportionately less than other parts of the United States during the current recession, is well placed to rebound strongly in the widely expected recovery early in 1992. This will result in a noticeable increase in business/leisure travel.

Primary Assistance Available from the Tourism Division

The staff of the Division work with partners from Canada and within the territory to promote specific products, destinations and programs. Our actions are substantially defined by the needs of our clients who are defined as those providing, supporting, promoting or marketing Canadian tourism products and services. In addition, we establish and maintain contact with the wide variety of organizations in our territory which influence travel decision making. We collect, analyze and disseminate market intelligence, monitor competitor activity and organize a diverse selection of events, promotions, missions and the like. We maintain a comprehensive contact database and provide to clients facilities for their temporary use as offices or for receptions/presentations.

Subsector Profiles and Product Development Potential in Territory

A) Business Travel (MC&IT)

(i) Associations

This territory is home to the second largest concentration of national and international associations in the U.S. (after Washington, D.C.).

City	No. of Associations
Chicago Metropolitan	1,200
St. Louis	100
Kansas City	120
Milwaukee	140

Because bylaws prohibit some associations from holding meetings in Canada, the Consulate continues to qualify associations as potential prospects.

Chicago is a particular center for medical associations including the American Medical Association, the American Dental Association, and the American Hospital Association as well as many medical societies. Examples of other major associations based in this territory include; The American Bar Association, the American Architectural Mfrs. Association, the American Soybean Association, Million Dollar Round Table, and the North American Baptists.

Also headquartered in Chicago are several multi-association management firms. These companies provide a myriad of services for all types of associations including meeting planning and site selection. One of the largest is Smith Bucklin and

Associates, based in Chicago, which has 600 employees, and represents over 155 associations. Other multi-association management firms include; Bostrum Corporation, The Association Management Center, PM Haeger and Associates, and Humes and Associates.

Suppliers interested in tapping into the association market need, first of all, to concentrate on Chicago. The Chicago Society of Association Executives is large and well established (1916) and hosts a premier supplier showcase each December which attracts 1200 association meeting/event planners, mainly from the midwest.

In addition, individual promotions with selected associations is necessary including, where appropriate, site inspections. Selling Canadian facilities requires an extra measure of salesmanship but the size of the market merits the effort.

(ii) Corporate Meetings

The Chicago territory is home to one third of the largest U.S. industrial corporations and seventy-one Fortune 500 companies are located in this region. Many of these firms are household names including Allstate (insurance), Amoco (energy), McDonald's (food), Anheuser-Busch (beverage), McDonnell Douglas (aerospace) and Motorola (electronics). Chicago is a center for meeting planning companies, with the Chicago Association of Meeting Planners International (CAMPI) membership exceeding 800. In addition, corporate travel agencies, event management firms and association management firms and association management companies are key contacts which are the subject of regular attention by the Consulate.

(iii) Incentive Travel

The incentive travel industry located in the Chicago post territory is one of the largest in the United States. The single largest incentive house in this territory, Maritz Motivation, is a division of Maritz Travel Company based in St. Louis, Missouri.

Over half of America's largest companies use Maritz which employs approximately 5000 people. Also in St. Louis are Intrav and Meridien, both aggressive and successful firms.

The incentive travel companies in the Chicago area consist of several medium to small sized firms that are actively challenging the established leaders. Our current directory lists over 40 Chicago based incentive travel firms including; Motivation Excellence, AHI Incentives, and S & H Motivation.

Most incentive travel firms have coordinated Canadian destinations in the past. Generally, they are interested in Canadian product, but must be regularly contracted using current materials. Personal contact cannot be over emphasized. Major concerns include program length and ease of connections as well as offering destinations which appeal both to men and women.

B) TRAVEL TRADE - Touring/City

There are approximately 2,500 retail travel agents in the territory with 1,400 in Illinois, 500 in Missouri, 500 in Wisconsin, and 75 in the 5 counties in Indiana.

There are over 120 Wholesalers/Tour Operators in the territory with the highest concentration (61) in the state of Illinois followed by 34 in Wisconsin, 23 in Missouri, 3 in Kansas, and 1 each in Indian and Iowa. The combined scheduled tour offerings to Canada by these operators number over 500 with 40% having multiple departures. Of these tour offerings 55% are of 5 days duration or less and 35% are of 10 days to 2 weeks duration. These figures do not include any special departures the operators may have for tailored groups on special request.

Estimates of Wholesalers/Tour Operators gross revenues for 1990 on scheduled tour programs to Canada is over $75 million, approximately 5% of gross sales in the territory.

The touring segment continues to dominate travel to Canadian destinations by midwest visitors. Motorcoach and private vehicle travel enjoy a perception of low cost/high value combined with relative flexibility. Major tour operator such as Mayflower and Munsen's effectively promote motorcoach tours and experience very high rates of repeat business. Leisure oriented private vehicle travel to Canada is mainly influenced by umbrella advertising, print destination advertising, and local travel agents, in particular those licensed through the AAA which also publishes a monthly magazine, including travel suggestions, and issues customized travel guides.

Only Toronto and Montreal enjoy a "good" level of awareness in the city product segment and between them dominate the city oriented leisure travel business. Theatre, sports and special event motivators are the most important. Travel to other cities is hampered by relatively weak knowledge and poor air connections. Much needs to be done to diversify the city product. Similar observations could be made about resort destinations which have quite a low awareness level and are sold in meagre volumes. The most successful are ski destinations and this market has been growing steadily in spite of very competitive packages to western U.S. ski destinations. Other destinations will need special promotion if business is to be increased.

C) OUTDOOR/ADVENTURE

One of the fastest growing segments in the midwest, the outdoor/adventure designation encompasses a very wide range of products and marketing strategies. Generally, however, the segment is defined as one involving outdoor activity, requiring a degree of fitness, and of somewhat longer duration. Interest in outdoor/adventure products has grown with the fitness and environmental awareness boom, though many motivators are at work. The demographics of the market are interesting and will continue to push the average age of the outdoor traveller up. developing products which continue to appeal to older consumers yet conform to their capabilities will be a challenge, but worth the effort.

The traditional elements of this segment, hunting and fishing, have long been promoted effectively in the midwest, (the All Canada Show has seven shows each winter in our territory). Increasingly, trade shows are focusing on different targets (such as the Jerry Simon Ski and Golf Show and the International Adventure Travel Show) which are more in conformity with the growth segments identified in our marketing plan.

Of particular interest to those marketing these products should be the Chicago Metropolitan Ski Council (CMSC) which is made up of over 100 Ski Clubs and represents over 45,000 skiers. As well, the Consulate has been developing contacts in specialized organizations with potential for niche marketing including birding organizations, photography clubs, cycling clubs and travel groups. We anticipate excellent growth in this area.

Promotion Plans and the Media

(i) Promotion Plans

The tourism program operates in a crowded marketplace. The City of Chicago is home to 21 foreign, 3 state and 2 provincial (Ontario and Quebec) tourism promotion offices as well as large number of individuals promoting CVB's and selected destination products.

The Consulate's promotion program is substantially based on partnered events aimed at specific, high value segments identified in our marketing plan. These include business travel, high family income travel (typically childless couples, empty nesters, retirees) and, increasingly, outdoor/soft adventure travel. A comprehensive list of scheduled events is available from our office. In addition, recognizing the people based nature of this business, we are constantly engaged in establishing and renewing contact among key travel influencers in the territory such as association executives and managers, meeting planners, tour wholesalers and operators, travel clubs, carriers and the media. Promotional activities are governed by three criteria: focused (on priority segments consistent with our market strategy), partnered (linked with a specific client or client group) and, demonstrably effective (determined through strict post event follow-up and evaluation). We are constantly seeking new and innovative promotions which can capture the attention of increasingly jaded and "over-loaded" travel influencers.

(ii) The Media

Vital to effective promotion is the media connection. This territory, and Chicago in particular, is a center for media perhaps second only to New York. There are nearly 1300 newspapers and 1200 periodicals published in the territory. More than 80 television stations and 870 radio stations round out the media list. Included are such national T.V. entities as Sportsvision and WGN which are carried throughout the United States. The Consulate also maintains a very active relationship with writers and journalists who cover, all or in part, travel issues. Our extensive database is constantly being reviewed and expanded.

Conclusion

Overall, the challenges facing promoters of tourism/business travel to Canada are in building knowledge/awareness, overcoming a perception of high cost/lesser value and creatively minimizing the difficulties associated with transportation. Building volume to Canada, particularly in the business travel segment, will rely on exploiting the talents and resources of partners in the market. With an economic recovery widely expected, we may look forward to a significant growth in both promotion activity and expected results in travel to Canada.

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Territory Southern Ohio and Kentucky

1. Post Overview

The Post territory covered by the Canadian Consulate - Cleveland, encompasses the states of Ohio, Kentucky, West Virginia, 11 counties of western Pennsylvania, and has a total population of over 20 million. In 1990, this territory enjoyed a bilateral trading relation in goods of $19.6 billion (CDN), making it the third largest trading region for Canada in the United States. Also, 55 of "Fortune Top 500" companies are headquartered here.

For tourism, 67% of the population base (13 million) fall into the "Target Market Audience" category as defined by Tourism Canada - annual household income of + $25,000 (age 25 and above). On an annual basis, approximately 17% of the total U.S. inventory of package tours to Canada originate from the Cleveland Post territory. According to a recent American Bus Association study, Pennsylvania ranked number 1 and Ohio ranked number 3 out of 40 states that list motorcoach companies with permits to enter Canada. These two states comprise 22% of the 40 state total. Mediamark Research indicates that automobile travel accounts for 78% of the travel from this territory, representing approximately $133 million (USD) in tourism revenues to Canada.

In response to Canada's National Trade Strategy, the Department of External Affairs established, in 1987, Canadian Government Trade Offices in Pittsburgh and Cincinnati, with Trade and Tourism Officers. The objective of these "satellite" offices, which report through the Canadian Consulate in Cleveland, is to more evenly decentralize Canadian trade and tourism promotion efforts with assistance provided in all the major tourism sectors.

2. Post Services

Each office is prepared to service and/or assist the Canadian tourism plant by a) providing information on qualified sales leads by sector, b) participate in joint provincial/city/private sector programs, c) provide information on competitive strategies and programs, and d) provide analysis of marketable products and recommend proper distribution channels. The post programs as listed by sector indicate the marketing expertise available. However, services available and promotions are not solely limited to these programs.

3. Sub-Territory Profiles

The Cleveland, Pittsburgh and Cincinnati offices have included their own profiles.

4. In-Territory Marketing Opportunities

Accompanying this profile is a listing of available marketing opportunities, i.e., Travel Trade Shows, Consumer Shows, Sport/Ski Shows, etc. with the name and phone number of the producing organization. This list represents an opportunity for the Canadian tourism plant to participate in a specific sales event on a solo basis or potentially in conjunction with the appropriate office.

CLEVELAND OFFICE - Tourism Profile

The Cleveland office is responsible for northern Ohio, with a total area aggregate population of 4.2 million. The Cleveland-Akron Metropolitan Statistical Area represents the 12th largest consumer buying market in the USA, and the greater Toledo area represents the 78th largest buying market. The Cleveland Metropolitan Statistical Area is headquarters for 23 of Fortune Magazine's Top 1,000 and 74 Cleveland-headquartered companies have annual revenue exceeding US $100,000,000.

Tourism Sector Situation - Travel Trade

There are over 50 tour operators with 31 actively selling Canadian tour products and over 500 travel agencies with approximately 270 actively selling Canada. USAir and Air Ontario both offer direct air service to Toronto and Montreal. TBI Tour of Cleveland, is the third-largest US buyer of VIA Rail services. AAA Auto Clubs have 34 offices in Cleveland (17), Toledo (12) and Akron (5), with combined consumer membership exceeding 650,000. Canada is their second most-requested destination from the motoring public, (primarily Ontario and Quebec). The Canadian Consulate maintains direct contact with the travel trade to assist in promoting Canada as a destination. We also work with the Canadian travel industry in offering Product-Testing Tours, Group Leader Tours, Familiarization Tours, Educational Seminars and Marketplaces to promote Canada.

Media

Print - The Consulate works with 12 daily newspapers, 2 regional monthly magazines and the Cleveland AAA Motorist Magazine to promote Canada as a travel and outdoor destination. This working relationship with the local media has produced excellent coverage on Canada's tourism industry.

Electronic - The Consulate has an excellent working relationship with the CBS affiliate in Cleveland, WOW TV8, which has promoted Canada through their travel-segment reporter and other general interest shows. We have also been actively involved in radio promotions in Cleveland, Akron and Toledo, where we negotiate to give away trips to Canada, in exchange for free advertising and/or free booth space at a travel show.

Meetings, Convention & Incentive Travel

We maintain a qualified database of over 210 meeting and convention planners and incentive travel operators. We concentrate our promotional efforts in Site Inspections with provincial, convention bureau and center representatives. The office holds associate membership in CAMP - Cleveland Area Meeting Planners, and OVBTA - Ohio Valley Business Travel Association, the two major sources of qualified business travel leads.

Outdoors/Adventure Travel

The Consulate has worked with Public Broadcast System (PBS) nationally syndicated outdoor show featuring Joe ~Kastaway~ Kulis. In 1992, this show will primarily feature 13 Canadian outdoor adventure locations.

We have identified 28 Ski clubs, with 4 offering trips to Canada.

PITTSBURGH OFFICE - Tourism Profile

The Canadian Government Trade Office in Pittsburgh is responsible for western Pennsylvania and West Virginia. The major urban centers in the territory include Pittsburgh and Erie in western Pennsylvania, and Charleston, Wheeling and Huntington in West Virginia. We have found that our major efforts in tourism need to be directed to the Pittsburgh area, with a population of 2.3 million. The city's economy underwent a successful transition in the 1980's following the decline of the domestic steel industry. Today, the region's economy is fuelled by growth in the health care, education, advance technology, and corporate services. Internationally, Pittsburgh is now considered the prototype of an industrial city that successfully maintains a high quality of life for its citizens. From 1985 to 1990, Pittsburgh proudly carried the Rand-McNally title of ~Most Livable City in the United States,~ and presently ranks 3rd.

A new $690 million international airport facility is scheduled for completion in 1992. This will position Pittsburgh as a major U.S. transportation center. Currently, Canadian air access from Pittsburgh to Canada is excellent, as Canadian Partner, Delta and USAir have a combined total of 11 flights daily to Toronto. In addition, USAir has daily service to Hamilton, Ontario (5 flights); London, Ontario (5 flights); Montreal, Quebec (8 flights); and Ottawa, Ontario (5 flights).

Tourism Sector Situation - Travel Trade

There are currently 21 tour operators and 279 travel agencies in the Pittsburgh area, most of which are selling Canadian products. The Pittsburgh AAA Club has 9 offices in the metropolitan area, with membership exceeding 450,000 (there are an additional 15 clubs in western Pennsylvania).

Both ABC Travel out of Greensburg and Rosenbluth Travel are looking to expand their Canadian product. This is an excellent opportunity to be part of a new line of Canadian tours. In addition, there are two educational tour operators (Crawford Tours and Scholastic Tours) who are bringing Canadian trips to the forefront of their business.

Media

The office is in constant contact with the two daily newspapers, two monthly local corporate publications, and the West Penn AAA Monthly Motorist Magazine. We are a supporting member of PA Outdoor Writers, and have experienced great success with this affiliation. Also, we have successfully coordinated radio promotions.

Meetings, Conventions & Incentive Travel

Pittsburgh is the home of twelve Fortune 500 companies and thirteen Forbes 500 companies. More than 800 firms and 85,000 people are involved in advanced technology, and 250 international firms have U.S. headquarters or offices in the Pittsburgh region.

This office is actively involved in Meeting Planners International and the Pittsburgh Society of Association Executives. We arrange for site inspections, familiarization trips and educational seminars to meet the planners needs. Currently we have 331 planners in our WIN data base. There are presently 24 ski clubs in our territory. The two major clubs (Erie and Pittsburgh with memberships of over 2,000) are skiing eastern and western Canada annually.

CINCINNATI OFFICE - Tourism Profile

The Canadian Government Trade Office in Cincinnati is responsible for tourism promotion in all marketing segments in South/Central Ohio and Kentucky. There are five major metropolitan markets in the territory (Dayton, Cincinnati, and Columbus, OH, Louisville and Lexington, KY) with a population base of approximately 5.5 million. Included in this territory are headquarters for 16 of the industrial fortune 500s and 10 of the Retail Fortune 500s. In terms of industrial markets in the U.S., Cincinnati ranks 13th, Louisville 29th and Columbus 32nd. Cincinnati and Louisville have a nearly even mix of manufacturing and service industries, with Dayton tending slightly more towards manufacturing and Columbus/Lexington more towards the service sectors.

Tourism Sector Situation - Travel Trade

There are currently 41 tour operators in the territory with approximately 70% offering Canadian product. The office has a database of 73 individual Automobile Club offices with a combined membership exceeding 1.7 million. There are also approximately 700 travel agencies in the territory. Cincinnati also liaises with the National Tour Association which is headquartered in Lexington, KY. Our office maintains active contact with the travel trade and media through seminars, familiarization tours, trade shows and general assistance. Direct air links from the territory are limited to regional commuter equipment (19-50 seat capacities) through Columbus, Dayton and Cincinnati, Ohio. Hunting and fishing segments continue with traditional strength, though are difficult to target directly.

Media

The office concentrates primarily on the print medium, actively liaising with 6 major daily newspaper (combined cir. approx. 1.1 mill) and several magazines (regional and national). The media database contains approximately 100 freelance contacts with the majority publishing in outdoor markets. The office is actively involved with the Kentucky and Ohio outdoor writer's associations (KOPA and OWO) and is represented on OWO's board of directors. The auto clubs produce in-house publications for their membership, though the majority of the editorial material comes from out-of-territory sources. Opportunities for radio promotions in the territory are good.

Meetings, Conventions & Incentive Travel

The meetings, convention and incentive travel sector is the strongest segment. The office maintains a database of approx. 750 contacts (updated annually), most of which fall within the small meeting category (50-250 attendees). Prospects for further development of the corporate travel segment are good. Incentive market potential is extremely good with 23 of the U.S. Insurance Fortune 500s located in the territory, as well as a number of other service related industry headquarters. Post promotional activities are generally focused around site inspections/familiarizations, trade shows and membership in various regional trade associations (CSAE, OSAE, OVMPI, etc.).

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Sally Ellis, Commercial Officer/Tourism responsibilities: Travel Trade, Tour Operators, Group Travel Influencers, Outdoor/adventure, Ski, and Newsletter.

Phyllis Tackitt, Commercial Officer/Tourism responsibilities: Meetings, Conventions & Incentive Travel.

Edie Eastep, Travel Assistant/Tourism Secretary

TERRITORY INFORMATION

Statistics

The territory and respective population of the states served by the Dallas Canadian Consulate General are:

State	Population	Visitors to Canada
Texas	16,986,510	295,000
Louisiana	4,219,973	70,500
Oklahoma	3,145,585	34,800
Kansas	2,477,574	57,900
Arkansas	2,350,725	27,100
New Mexico	1,515,069	35,300
TOTAL	30,695,436	521,000

This territory, excluding Kansas City, has a population exceeding 30 million. The 1990 census indicates that of the ten largest cities in the United States, three are located in the territory covered by the Dallas Consulate: #4 Houston, #5 Dallas/Fort Worth, and #10 San Antonio. Texas has 7% of U.S.A. baby boomers, which ranks 3rd behind California and New York/New Jersey. Dallas ranks tenth in the number of households of retirees, and Texas ranks fourth in total retiree population.

Texas is currently the second largest state in terms of population and dominates the Southwest economically, culturally and politically. Indications are that the sun belt will experience a growth trend in the years to come.

Airport Statistics

DFW International is the world's second busiest airport for passenger travel. It is the busiest airport in the Southwest. Over 48.5 million passengers travelled through DFW in 1991. While over 2000 operations occur at DFW each day, August remains the busiest month, with over 2.3 million passengers.

International traffic at DFW increased 5.31% over 1989. DFW travellers continue to choose Mexico as their number one destination. This is followed in order by England, Germany, Canada, France, Japan, Spain, Caribbean, and other (Central America, New Zealand and Australia).
There are 12 flights a day departing for Canadian cities. Four Canadian cities rank in the top 20 international destinations: Toronto - #1; Calgary - #8; Montreal - #10; and Vancouver - #12.

By 2010, DFW expects to grow to over 120 million passengers; that is over 328,000 people per day.

Major Publications

There are 3,011 media outlets in the post territory, including 284 daily newspapers, 1,106 weekly newspaper, 189 television stations and 1,432 radio stations.

The largest publication in the territory is Boys Life, coming out of the Boy Scouts of America's Irving, Texas, headquarters, with a monthly circulation of 1.3 million. The second largest publication in the territory is AAA World, the American Automobile Association publication, with 560,000 copies bi-monthly for Texas, Oklahoma and New Mexico, while Texas Monthly covers a five-state area with a monthly circulation of 300,000. D Magazine appeals to Dallas area readers with a circulation of 102,000. Houston publications include Ultra Magazine with a circulation of 82,000, and Houston Metropolitan, with a circulation of 86,000.

The following is a survey of the 15 principal newspapers in the territory:

DAILY NEWSPAPERS	CIRCULATION	
	DAILY	SUNDAY
*Houston Chronicle (Texas Magazine on Sunday)	439,574	622,608
*Dallas Morning News (Dallas Life Magazine on Sunday)	412,868	611,716
*Houston Post	310,758	358,121
*Fort Worth Star Telegram	265,855	344,176
*Daily Oklahoman (OK City)	240,000	330,000

*New Orleans Times-Picayune	279,000	326,167
San Antonio Express News	185,422	274,150
Tulsa Tribune	217,559	248,698
San Antonio Light	172,000	242,000
Little Rock Arkansas Democrat	146,253	236,000
Dallas Times Herald	156,126	230,800
Austin American Statesman	174,511	220,660
Little Rock Arkansas Gazette	150,000	217,506
Wichita Eagle-Beacon	121,730	196,686
Albuquerque Journal	157,000	161,152

*Note: 6 of the top 51 newspapers in the United States, in terms of circulation are headquartered in this territory.

Economic Profile

The economy has diversified from its reliance on petroleum and agriculture. While these primary industries are still vital to the wealth of the region, the relocation of major corporations to the territory, especially to Texas, combined with the expanding position of North Texas as a world communications center, has resulted in slow but steady growth. Petroleum, agriculture, communications, aviation, electronics, high technology, military and related defense initiatives, and federal scientific programs dominate the economy of the territory.

Reporting on market and economic conditions, as well as travel trends, is becoming increasingly important in identifying market potential in the various U.S. markets. This information is compiled on a monthly basis and is sent to Tourism Canada for dissemination to the Canadian public and private sectors via the Tourism Canada Bulletin. As budgets decrease and the tourism program becomes more streamlined, we consider the gathering of market intelligence to be of utmost importance in identifying the "players" in this highly lucrative industry. It is vital to spend the limited dollars we have to maximize the return in revenue to Canada by providing qualified leads to both Canadian public and private sectors. We integrate market intelligence into our sales calls, allowing us to report on the most current market conditions in our six-state territory.

MARKET SECTOR ANALYSIS

Travel Trade

The Dallas territory boasts 235 tour operators/wholesalers, with a small percentage being large companies, such as Dan Dipert Tours and DFW Tours. The majority are small motor coach operators offering several travel products, of which two or three are to Canadian destinations. This product base has a good growth potential, since wholesalers are familiar with Canada and comfortable with selling additional destinations. Three tour operators in our territory conduct tours strictly for recreational vehicle caravans/rallies. The AAA has 40 offices in the Southwest, with the regional headquarters located in Houston.

Of those wholesalers and tour operators with Canadian products,
- 77% have motorcoach tours
- 56% include motorcoach/air products
- 19% currently include motorcoach/rail products
- 35% include motorcoach/cruise products.

While adventure/outdoor products may have grown in popularity, there is no formal network developed in which to direct marketing efforts. Individuals often arrange their own adventure travel based on personal recommendations, advertisements in publications and attending adventure/outdoor trade shows. We continue to gather market intelligence through sales calls and publications.

The ski market continues to be strong in Texas. American Airlines and Delta Airlines have service to Calgary and Edmonton, enhancing growth for Kananaskis/Banff/Sunshine/Lake Louise regions. Whistler was named the second most popular ski destination in North America by Ski Magazine, and has grown in popularity; but a lack of non-stop air service from the post territory to Vancouver continues to put Whistler at a competitive disadvantage.

The Texas Ski Council dominates influence in the ski industry. It sponsors four annual trips; one of which will be international, which attracts 800 to 1400 skiers. Banff was chosen in March, 1988, and again in January, 1991 as the ski destination for the Council's international trip. Individual club trips also are coordinated by each of the 21 member clubs. The post is currently working with tour operators to develop an Eastern Canada ski product.

The Dallas post has identified as a priority initiative the maintenance of a computer data base in support of the travel trade program. We actually have developed a network of data bases and listing, including 2400 retail travel agencies, the 20 largest travel agencies in each major urban area, tour operators and adventure clubs.

This office utilizes current computer profiles on all travel influencers, tour operators/wholesalers in the territory to identify and encourage product development of Canadian destinations. We invite buyers to Rendez-Vous Canada, identify influencers who would potentially attend provincial and city reverse marketplaces or participate in individual Visit Canada Program initiatives.

How We Assist

1. Joint promotions
2. Product launch
3. Sales leads/referrals
4. Counselling to travel industry
5. VCP trade/FAM trips
6. Market intelligence
7. Quarterly newsletter

Meeting, Conventions and Incentive Travel

Canada is an extremely popular destination for the lucrative meetings, convention and incentive travel markets. The post territory has the third largest number of Fortune 500 headquarters offices of all U.S. posts, as well as nine of the top 100 industrial company corporate offices. In the past few years, Texas has become the new home to several major corporations. Particularly noteworthy are Kinberly-Clark, AMDAHL, GTE, J.C. Penney, Fujitsu, Mishusta, MCI, Exxon and Greyline World Headquarters. Additionally, 49 of the Fortune 500 service companies are located in this territory, and Texas ranks #1 in the Forbes 400 list of privately held companies (42) headquartered in the USA.

This territory boasts the third largest concentration of corporate headquarters, the third largest concentration of associations, and the 4th largest concentration of insurance companies.

Worldwide competition for the lucrative meetings market is intense due to limited availability of airline service. There are more non-stop and direct flights from the Southwest United States to major European centres than to Canadian cities. It is anticipated that bi-lateral air negotiations will result in increased accessibility to Canada from the Southwest. And while resorts have grown in popularity in the corporate market sector, the accessibility of upscale resorts in the western United States to territory clients makes it difficult to market Canada's resort destinations. The availability of daily non-stop service from Dallas to Calgary and Toronto enhances the competitive advantage of the resort products in those cities. Cooperative advertising campaigns by Canada's competitors in selected influence oriented MC&IT publications support the marketing efforts of numerous destinations.

Many large incentive travel companies are located in the post territory. These incentive houses include Business Incentives; SEI, Inc.; Global Enterprises, Inc.; MCI Meeting Planners; Journey House Travel, Inc.; Travel Planners Inc.; Group Incentive Travel; and a large regional office for Maritz Meeting Planners. Sunbelt Motivation & Travel Inc., is the largest incentive house in the Southwest, and they are a large supporter of Canada. Additionally, Lifeco, a large nationwide multi-purpose travel company, recently moved their incentive division to Dallas. Travel Stars and Motivation, an established incentive house, was incorporated into Murray Travel, to create a new in-house incentive branch.

The Southwest boasts one of the nation's largest concentrations of insurance company headquarters. Travel is still the largest single motivator for an insurance agent, and for those insurance companies that can no longer rationalize or afford a first class incentive trip to Europe, Canada is viewed as a viable alternative destination.

Other domestic destinations receiving a large portion of the conventions/incentive business include Hawaii, Caribbean, Puerto Rico, virgin Islands and the Dominican Republic. Primary foreign destinations that easily attract the incentive market include Hong Kong and Western Europe, with a focus on England, France, Italy and Switzerland. Unfortunately, few cities in Canada have managed to package themselves as incentive destinations.

There is a concern that we will begin to see aggressive marketing activities undertaken by members of the European community to attract MC&IT business to a united Europe. The "European Economic Community" will be in place by December 31, 1992, and 12 European countries will be able to pool their resources to attract the lucrative U.S. meeting, convention and incentive travel market.

The Dallas post has identified as priority initiative the maintenance of the WIN Tourism Database for MC&IT clients. The WIN tourism data bank is updated annually during the spring/summer. Through research, we have identified over 2000 corporations, associations, insurance companies and incentive/meeting planning houses headquartered in the post territory. Of these, over 1,000 organizations consider Canada to be a viable meeting and incentive destination. these potential clients can be categorized as follows: 400 associations, 350 corporations, 100 insurance companies, and 250 incentive and meeting planning houses.

In addition this office is coordinating an effort to increase the Canadian data base within Meeting Services Network, a division of AMR Corporation. This meeting planning and site selection software package is the fastest growing system in the country with over 15,000 subscribers.

How We Assist

1. Lead generation and client pre-qualification
2. Profiles of clients in territory
3. Qualification and coordination of client site inspection visits
4. Qualification and coordination of client participation in provincial/municipal/private sector familiarization tours
5. Coordination and execution of "Showcase Canada", our annual MC&IT marketplace/trade show held in Houston and Dallas in May of each year
6. Market intelligence

Airlines

American Airlines and Delta Airlines continue to be the major carriers to Canada from this territory. American Airlines, the largest airline in the western world, is based in Fort Worth, Texas, and has expanded its routes to serve five Canadian cities, with 13 departures daily from DFW, including non-stop service to Calgary and Toronto. Direct service is offered to Edmonton, Vancouver and Montreal, and one-stop service is offered to Vancouver. American has developed a joint market agreement with Canadian Airlines, Int. Although the Canadian Airlines International telemarketing and U.S. national reservation service center is located in San Antonio, Texas, this territory is not serviced by a Canadian carrier.

Delta has the second largest number of connecting flights to Canada from the territory. Delta now has 259 flights daily to 68 nonstop destinations. They recently broke ground at DFW Airport for an $80 million expansion that includes passenger, cargo and operations facilities.

Media

The Dallas post has sought to identify and contact those journalists in the territory who would best provide coverage for Canadian destinations. Extensive work has been initiated with travel and outdoor writers to obtain high profile coverage for Canadian destinations. Inroads have been made in the area of electronic media, as different film crews were sent to Canada to obtain information on travel destinations.

While our territory does not have major travel publications, several free lance journalists have developed into solid contributors to various local and national publications with a travel related focus. American Way Magazine, the publication of American Airlines, is our primary local travel-related publication, and we enjoy a working relationship with the staff there.

We have developed a data base profiling our media representatives, and cultivate an ongoing exchange with them in order to participate in the Visit Canada Program for Media. The VCP Media effort has been highly effective in introducing new Canadian destinations to the American consumer, as well as reinforcing marketing support of the better known gateway cities.

How We Assist

1. Visits Canada Program (Media):
    a. Financial assistance to visit a Canadian destination
    b. Itinerary planning
    c. Arranging editorial contacts/appointments
    d. Coordination with provincial and city media officers.
2. Research assistance
3. Providing photographs/releases from our library
4. Joint promotions with provincial partners

5. Selection and coordination of media to attend a major media marketplace organized by the Canadian Consulate in Los Angeles.

PROMOTIONAL ACTIVITIES FOR 1992

After careful review of "Tourism on the Threshold", this office responded to the stated needs of private sector and government by implementing new objectives and initiatives to specifically address their concerns. Of utmost concern to the Canadian industry is market intelligence, the development of qualified leads, and knowledge of Canadian tourism products and services in the local travel industry. To that end, these concerns became our priorities.

Travel Trade

A FAX newsletter was implemented in 1990 as a cost effective vehicle to communicate to the territory travel industry. This initiative was developed as an additional method of enhancing client knowledge of Canadian products and services, as well as focusing on the latest developments in the Canadian tourism industry. The newsletter is distributed to the travel industry by facsimile on a quarterly basis. It has been well received and generates leads that develop into group departures. This post plans to continue distribution of the fax newsletter, highlighting private sector soft adventure and touring products for each season. Provincial and municipal governments, as well as private sector, are encouraged to utilize this venue to maximize exposure to group travel influencers in the post territory.

Additional FAX newsletter addressing specific issues will be released as needed. In January, 1991, separate newsletters were sent to tour operators, meeting planners/decision makers, and travel agencies advising them of the GST and explaining the rebate opportunities for the travelling public.

Annual Product Launch for selected group travel influencers will be held inn 1992 the week of February 17-20 in San Antonio, Austin, Houston and Dallas respectively. Participation is limited to no more than 30 exhibitors.

A series of educational seminars are held throughout the year with leading tour operators, travel agencies and airline reservation centers. Again this year, we will conduct extensive educational seminars with American Express Retail agencies and associates in conjunction with a "Focus on Canada" celebration the month of May.

Our largest travel consumer show is held in Dallas each March by American Airlines Fly Away Vacations. The Vacation Supermarket draws 30,000 consumers and travel agents to Dallas. This year Canada will have over 30 exhibitors. Our largest contingent will be from Alberta. In conjunction with this event, we host a trade mission for exhibitors in the form of a seminar on marketing to our territory.

Meeting, Conventions, and Incentive Travel

"Showcase Canada" will be held May 6 and 7, 1992 in Houston and in Dallas. In 1991, 37 Canadian exhibitors participated in this MC&IT marketplace and film viewing event. Over 250 clients attended "Showcase Canada" in 1991. Serious clients from across the six-state territory were flown to the city of their choice to attend this event.

In conjunction with this MC&IT marketplace, the post conducts educational seminars for clients on the recent streamlining of customs rules and regulations for delegates attending trade shows and conventions in Canada. This year, seminars will be added to address decision-makers' concerns with GST tax and its ramifications.

The marketplaces are followed by site inspection visits/familiarization tours coordinated with the provincial and municipal governments. These visits continue to prove to be the best venue for introducing serious clients to Canadian cities and resorts that best suit their meeting needs.

As of December, 1991 (fiscal year 1991-92), this office coordinated over 55 site inspection visits. During the previous fiscal year (1990/91), this office coordinated over 79 site inspection visits. Our booking ratio from site inspection visits is in excess of 82%. As a result of the active MC&IT program, this office generated 46.1 million dollars for Canada. Just over half of that figure, 28.4 million, was generated as a direct result of Showcase Canada and/or site inspection visits.

CANADIAN CONSULATE GENERAL/TOURISM

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Tourism Personnel

Martin M. Rice, Senior Commercial Officer - Tourism. Supervises and is responsible for all promotional activities undertaken within the travel trade, meeting and conventions and media sectors. Coordinates federal/provincial/territorial and private sector liaison to deliver the tourism program.

Heather Phelps, Commercial Officer. Responsible for meetings, convention and incentive travel market.

Anne Cascadden, Commercial Officer. Responsible for travel trade, media, auto club development and outdoors.

Cheryl Clark, Secretary/Travel Counsellor.

Overview

The Post's territory, which includes Michigan and Indiana and their proximity to Canada provides a wealth of excellent marketing opportunities and challenges. This border post enjoys a high awareness of Canada as a viable travel destination in which over 15 million U.S. residents are within a one day or less drive to Canada. Twelve million residents enter Canada at the four major border points from the State of Michigan a) Ambassador Bridge b) Windsor/Detroit Tunnel c) Sault Ste. Marie and d) Sarnia. This represents over 32% of the total annual visitors to Canada enter through our territory.

Canada's potential for growth from this territory is increasing due to the fact that residents are staying closer to home, and are seeking accessible and safer destinations. Trend has been usually in the 2 to 4 day getaway packages with a demand for both moderate priced packages as well as high end prices packages (i.e. Phantom of the Opera). We are finding increasingly that the high yield buyer doesn't mind paying top dollar as long as they receive value for the price they are paying. Niche segments such as soft outdoor/adventure and resorts which offer full service amenities are also in demand. Further, there has been an increase in demand and sales to destination such as Western Canada in the past year.

Through a focused/targeted sales call program we have expanded our qualified data bank and contacts in our priority market segments which are: a) Touring b) Business Travel (MC&IT) c) Outdoors and d) City.

The Canadian Consulate General in Detroit has a staff of knowledgeable professionals that can provide you with territorial market intelligence and expertise. Our promotional programme activities which we organize and/or support include familiarization tours, travel trade promotions/marketplaces, media and group influencers trips, auto club and meetings/convention planners activities. We have the ability and desire to assist our "Canadian Partners" in the promotion of their product within the boundaries of our territory responsibility: the states of Michigan and Indiana.

CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN TERRITORY

Touring

The target groups for our Post in the Touring segment are automobile clubs, travel agents, tour operators and special groups, such as group influencers, senior citizen clubs and group leaders and parks & recreation decision makers.

Post has increased it's development of educational seminars with the territory travel trade. Our findings have shown that they feel more comfortable and tend to actively sell a particular destination more when they have thorough and complete knowledge of the major areas of Canada, it can not be assumed they are just as knowledgeable of our product line. In the touring market segment, these seminars have been extremely beneficial in the past 18 months and such seminars have produced excellent results.

Automobile Clubs:

The Michigan AAA has 35 branch offices throughout the state and 1.5 million members. It is the third largest auto club in the United States whose influence has proven to be extremely important to the Canadian Tourism Industry. Canada ranks 4th in demand for trip-tiks from it's membership.

Activities include educational seminars with travel associations, Canada Customs and NEBS Missions.

The Hoosier Auto Club has in excess of 350,000 members and though not as active as Michigan AAA, it is still a strong supporter of the Canadian product line.

Tour Operators

Within our territory there are approximately 180 tour operators and wholesalers that actively sell Canada.

Our survey indicated that these operators sell annually more than 300,000 individual packages to Ontario and Quebec destinations alone. Moreover, our direct daily experience with tour operators has determined that due to the uniqueness of our market area (i.e. proximity to Canada) this figure is higher. We have some confidence in this statement because many retail travel agencies which we have also recently surveyed have reported separately that they annually put together 2 to 6 groups on their own, without using the services or packages offered through the wholesaler or tour operator. The travel agency prefers because of the higher margins to make their own arrangements directly with the Canadian tourism supplier and/or transportation company.

This year due to the slow down in European Holidays, we have noted a significant increase in both demand and actual sales to longer haul destinations in Canada such as Eastern & Western Canada.

Special Groups

According to demographic statistics there is a significant number of senior citizens clubs in our territory which us another attractive potential client base to develop. Our information would indicate that our seniors have a) disposable income to spend on travel b) the desire and time to travel, and c) actually undertake an average of 4 trips to different destinations annually d) prefer to go on 2-4 day mini-trips. Another emerging target market is the Black American traveller in which it is estimated that they spend over $50 billion annually for travel/leisure destinations.

City

The post has generated over $1.2 million in editorial value media articles within the territory. Post sponsored VCP Media trips to all areas of Canada in 1990-91 which resulted in a considerable amount of positive print. Presently we are focusing on major winter events (i.e. Winterlude, Quebec Winter Carnival) to further develop Canada's city winter product line.

Cultural activities and events such as the Stratford & Shaw Festival as well as events such as the Calgary Stampede are becoming more in demand. To further develop the City Market segment, Post has sent qualified tour operators for site inspections to Ontario, Quebec, Alberta and Eastern Canada in which we anticipate new and expanded tour development in 1992-93. Longer haul destinations will utilize the fly/drive tour package format in these new programs. Ambassadair, out of

Indianapolis, increased their airline departures (727's) to all major cities in Canada in 1991 in which they had over 30 pre-planned trips to major Canadian cities.

From our territory Toronto, Montreal, Niagara Falls and Quebec City are still the popular destinations, but we have noticed a small shift in Western Canadian destinations such as Calgary, Edmonton, Vancouver & Victoria.

Post plans to continue to utilize the Educations Seminar format with Canadian tour operators to further show the accessibility and affordability of city destinations in Canada to territory travel trade.

OUTDOOR

Outdoor/Soft Adventure

The outdoor market segment is becoming increasingly important in our territory. There has been a demand for soft adventure programs which has provided an opportunity for Canadian Resorts to expand marketing endeavour in our territory. Post hosted their first NEBS Tourism Mission last fiscal, focusing on resorts. Participants felt there was ample opportunity and potential to increase their market share especially from the State of Michigan.

There are a number of major outdoor sport shows in our territory including those that market boats, motors, fishing and hunting equipment and recreational vehicles.

There are many demographics which clearly indicate that outdoor including RV enthusiasts abound in this market. Hunting and fishing are particularly popular activities and there are for example some 900,000 deer hunting permits issued annually in the State of Michigan. Boating and watersports in general, one also important target markets as Michigan has a higher per capita boat ownership ratio than any other state including California or any other coast state.

Skiing

Skiing is another particularly large target market segment for opportunity to capitalize on the drive market (within a full day's drive). Most major ski areas within Ontario and Quebec are within a one-day drive of Michigan, and most of the Ontario resorts are within driving distance of Indiana. Alberta and British Columbia resorts do face tough competition with the Colorado Rockies and Utah markets but there has been a surge in special groups (i.e. Ski Clubs that are now booking longer haul Canadian Ski destinations).

The Metropolitan Detroit Ski Council (MDSC) consists of 38 member clubs. Current memberships totals approximately 11,000. The MDSC which the Post actively supports and participates in as many of their events as possible co-sponsors the Detroit Ski Show held each October in Detroit. A business membership in the Metropolitan operator, etc. including Canadian which would provide access to all the clubs. The MDSC organizes a Spring Vendors Marketplace which is intended to allow the Ski Club presidents and trip chairpersons the opportunity to meet with suppliers and in which the Post participates. The "Mountain Crier" is MDSC's publication.

In June 1991, the Post co-sponsored two "Ski Can" promotions. Although this was an off-season promotion the participants estimated that Ski Can will generate in excess of $350,000 U.S. new business from our territory this winter. Moreover, they consider the promotion important enough that they have asked that we repeat the event in June 1992.

The Post successfully hosted in October, the All Canada Ski Show at which 25 ski destinations from all the major Canadian ski regions met with about 200 qualified Ski Club Presidents and group planners as well as travel agents that actively sell ski packages.

Business Travel (MC&IT)

With the reduction in many corporations budgets in the past two years as it pertains to meetings, conventions and incentive travel, we have found there is a renewed interest from these meeting planners/decision makers in Canada. In the past, when there was ample dollars available, many companies, corporations, incentive buyers, etc. looked for the ultra exotic destinations. The shifting economy has led them to take a closer look at Canada and as a result the interest from our territory has increased dramatically.

A priority program developed in 1991 in this segment was a targeted and focused sales call program by our Business Travel Officer. As a result our data bank has increased from 470 qualified leads to 1013. Further there is additional "real" interest in

Canadian destinations as a site for further meetings. This was reflected recently in our Quebec Night in which 48 of 50 rsvp's attended a presentation/dinner co-sponsored by the Post, Quebec City, Montreal and the province.

We anticipate 25 qualified site inspections to various areas in Canada will be implemented in 1992-93 which ultimately will generate an additional $20 million in revenue to the Canadian travel industry economy between 1993-1996.

Further, our ongoing sales call program, will continue to assist in developing and sustaining an awareness of Canada as a prime meeting and convention declination as well as providing Canadian industry partners with qualified leads. Post has also initiated a GST education awareness campaign to advise meeting planners of the rapid changes in the Goods and Services Tax as it pertains to their meeting plans in Canada. These changes have been well received by our planners. In 1992 Detroit will host the Meeting Planners International Conference, which will afford the opportunity to create additional awareness of Canada in this segment.

Our office is very active in many State business travel organizations such as:

> Southeast Michigan Society of Association Executives of which Program Manager, Marty Rice is President for 1991-92.
> Michigan Meeting Planners
> Michigan Society of Association Executives
> Indiana Society of Association Executives

Also, Post officers participate and are involved in SKAL, PATA, ASTA.

CANADIAN CONSULATE GENERAL

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Tourism Personnel

John Rasmussen, Manager, Tourism Program

Monica Campbell, Commercial Officer (Tourism Media)

Jennifer Clark, Commercial Officer (Travel Trade)

Michael Zaretsky, Commercial Officer (Meetings, Conventions and incentive Travel)

Lisa Reeder, Senior Administrative Assistant and Travel Counsellor

Josephine Lozano, Administrative Assistant and Travel Counsellor

Territory Southern California (10 southern counties), Arizona and Southern Nevada.

Provincial Tourism Representation in Territory

Alberta, British Columbia & Ontario

Population The market region covered by this office has a population in excess of 22 million. This is distributed approximately as follows:

SOUTH CALIFORNIA		18,500,000
Los Angeles County	8,800,000	
Orange County	2,400,000	
San Diego	2,500,000	
ARIZONA		3,000,000
Phoenix/Scottsdale	2,000,000	
Tucson	7000,00	
SOUTHERN NEVADA		
Las Vegas	600,000	

Assistance Available from Post

Local market intelligence, qualified tourism leads (WIN Tourism database), support with new tour development, help with familiarization tours and site inspections, aid with media representatives, workshop seminars, list of consumer/travel trade shows, promotional assistance, loan of films and videos.

Travel Trade

Tour wholesalers/operators	450
Retail travel agents	3,600

Meetings, Conventions & Incentive Travel

Corporations	300,000
Associations	3,200
Meeting Planners	600
Incentive Travel Planners	700
Trade Show Organizers	15

Tourism Media

Radio	674
Television Stations	301
Daily Newspapers	87
Weekly Newspapers	404
Magazines/Periodicals	100
Freelance Travel Writers	250
Ethnic Weekly Newspapers	75

Other Influencers

Motor Clubs	80
Cruise lines	2

Foreign Government Tourist Offices in Territory 40

SITUATION REPORT

1. Overview

a) General: Despite current recessionary conditions, the South Western United states, and particularly Southern California, will certainly continue to be a dynamic and important tourism generating market during the 1990's. The State of California is the largest manufacturing location in the United States and has an economy about equal to that of Italy. Leading industries include the manufacture of transportation equipment, agriculture, biotechnology, and tourism, while principal natural resources include timber, cement, petroleum and natural gas. Southern California generates approximately 65 per cent of the state's economic activity. The greater Los Angeles metropolitan area is the second largest in the United States, and also the second largest banking center (behind New York).

Arizona's economy is also largely based on manufacturing, particularly in electronics and aeronautics. Agriculture and tourism are very important and the state produces more than half of the nation's copper.

Southern Nevada's economy is based largely on tourism centered on the gaming "capital" of Las Vegas and increasingly, the city of Laughlin, Nevada.

Over recent years, the growth in population and affluence of the Southwest has out-paced all regions of the United States. Southern Californians, in particular, take some pride in a reputation for fashion innovation and setting lifestyle and consumer trends for the rest of the country (if not the world) to follow. This applies equally to the creation of travel trends; residents of the region are well-known to have a high propensity to travel, often creating destination "fads". Vacations are increasingly taken at short notice, with a growing tendency for several short-duration trips in the course of a year.

The Arizona travel market is influenced by the relatively large and wealthy retirement communities in the state, providing a base of thousands of avid travellers who are rather less trendy, and more concerned with comfort, value and security as provided, for example, by all inclusive tour products.

The Southern Nevada market while rather smaller, is characterized by travellers who are a little like snow birds in reverse; travel to cool places preferably away from lots of other tourists and bright lights is often favoured.

Western consumers may be characterized by ethnic diversity, active lifestyles, and better education. They are trend setters with higher levels of disposable income, and increasing concern for the environment.

Against this backdrop, Canada enjoys a positive touristic image among all residents of the region, although sometimes the image is a little hazy.

b) Opportunities and Problems: The overriding market concern at the present time is undoubtedly the recession, which may have impacted on the region (particularly Southern California) later than some other parts of the country, but also appears to be lingering much longer, exacerbated by a significant reduction in defense spending by the federal government. The travel industry (international and domestic) has been particularly hard hit over the past year or so as many consumers, concerned about rising job losses, and/or falling returns from retirement investments, have deferred or cancelled plans to travel, while businesses have economized, by cutting back on all but essential corporate travel.

Over the years, the market attractiveness of the South West has not escaped the attention of almost every imaginable international (and domestic) tourism destination, resulting in a very competitive market environment.

However, Canada can continue to remain competitive by emphasizing its unique strengths to those defined target market niches most likely to respond to them. Those strengths include:

clean, green, natural scenery;
diversity of travel experience available;
friendly reputation of Canadians;
ease of access/cultural similarities;
safety;
and a perception of value for money.

Business travel to Canada should continue to grow as the recession fades and both countries enter an era of renewed prosperity fostered by the Free Trade Agreement.

While it is perhaps unfortunate that, thanks to many television weather forecasters, the most consistent message about Canada appears to be her singular responsibility for all the winter weather that afflicts the United States, a comprehensive awareness of Canada as an attractive travel destination may well remain one of the better kept secrets in the South Western United States. Awareness of the major attractions of British Columbia and Alberta is reasonably high in this region, however customer knowledge of much of the rest of Canada is low.

2. Travel Trade

a) General: Southern Californians have a wide range of vacation interests, including demand for an array of sporting, personal fitness, cultural and self-improvement experiences. Canada has the potential to cater to many of these markets demands. Several tour operators have developed new products including hiking, canoeing and horseback riding in the Rockies, dog-sledding and cultural adventures in the Yukon and North West Territory, kayaking and whale-watching off Vancouver Island, to list but a few. There is a strong demand for cruise holidays to Alaska via the western coast of British Columbia, with an increasing interest in innovative pre-and-post cruise tour programs. Resort experiences are also in demand as demonstrated by the success in this market of Tyax Mountain Lake Resort and Whistler/Blackcomb resort area. The stress of day to day living in large population areas such as Los Angeles and other Southern California cities creates demand for short "getaways" and hence marketing opportunities for many Canadian cities and resort areas. The senior market still provides significant potential for Canadian touring product of all types.

Overall, the Southwestern tourism market is extremely sophisticated and competitive, and all marketing strategies should be well thought out and targeted.

Buyers from Southern California have been assisted by attendance at regional marketplaces held in Alberta, Quebec, Ontario and the Yukon, however Rendezvous Canada continues to offer the best overall value from a national standpoint.

b) Touring Product: The largest tourism product segment in this territory, demand for Canadian touring product is largely due to the immense and growing seniors/mature travellers population retiring in this area. In terms of numbers, a significant portion of the touring business generated from this market is by wholesalers headquarted outside of the territory operating with a local regional sales office. There are, however a profusion of smaller operators meeting the needs of particular market niches, many with a significant repeat customer base.

Canadian destinations most favoured are Western Canada, centered on the Rockies, and increasingly Eastern Canada, particularly the north east corridor from Niagara, to Toronto, Ottawa, Montreal and Quebec.

c) Outdoor Sport/Adventure Product: Our second-largest vacation segment, demand for these types of vacation products is strong due to increasing numbers of younger, relatively affluent couples and singles seeking the challenge of both soft and hard adventure. The ski market has been particularly dynamic into British Columbia and Alberta, with Whistler gaining an ever-increasing flow of southern Californians. Many tour operators are beginning to experience demand for "ecotourism" defined as tourism experiences that are sensitive to, and feature the natural environment, while promoting conservation.

d) City Product: Demand for this experience comes mainly from seniors, often as part of an overall touring package, particularly in the "hub and spoke" type product and also from business travellers.

e) Resort Product: Currently representing a small portion of our vacation traveller market, this segment promises to take on a growing importance in this market territory during the 1990's for resorts ranging from larger all year properties, to small seasonal fishing retreats and luxury lodges

f) Future Plans: this Post is active in facilitating new tour development, and matching up product opportunities with market interests; this is done partly through our Visit Canada Program (Trade). The WIN Tourism (Travel Influencer) database maintained by this office is constantly updated to realize this objective. This also assists in the appropriate selection of contacts for rendezvous Canada and other marketplaces.

In January 1992, this office will organize and host a series of sales and marketing seminars for the travel trade. These events will be primarily educational in nature and feature in-depth workshop classrooms highlighting the Canadian products of participating wholesalers, complemented by a suppliers marketplace. The

Spring/Summer/Fall Seminars ("The 1992 Canadian Collection") will take place in four key locations throughout Southern California during the last week of January. Guest attendees will be targeted from travel agency owners, managers, and senior agents active in selling Destination Canada.

3. Tourism Media

a) General: Los Angeles is the media center of the West Coast, and as such, represents a market of practically unlimited opportunity for the skilful practitioner of public relations. It's the home of major electronic media opportunities, celebrity travel extravaganzas, national magazines, and hundreds of tourism freelancers distributing stories nationally. Despite a relatively modest travel advertising program in the Southwest, Canada is, nevertheless, able to have significant impact upon the market's overall awareness of Canada as a favourable travel destination by selectively targeting a media focus, thereby facilitating the promotion of both leisure and business travel.

b) Print Media: Many national magazines which carry travel-related articles are based in this territory. Many are vertically-oriented, (subject specific) thus providing excellent opportunities to highlight particular products. Modern Maturity, the magazine for the American Association of Retired Persons, (AARP) is headquartered in Los Angeles, has a national bi-monthly circulation of 22 million. Other interesting national magazines include Bon Appetit (1.3 million monthly), Shape (850,000 monthly), Men's Fitness (780,000 monthly), Architectural Digest (685,000 monthly), Highways (Good Sam Club - 670,000 monthly), Muscle & Fitness (650,000 monthly), Touring America (250,000 monthly), and Islands Magazine (150,000 monthly).

Numerous local glossy magazines containing travel sections cater to affluent local lifestyles: e.g. Family Living (1 million monthly), Westways (the Auto Clubs magazine with a monthly circulation of 500,000), Senior World of California (500,00 monthly), and Los Angeles Magazine Times (1.6 million), the Arizona Republic (550,000), the Orange County Register (450,000), the San Diego Union (422,000) and the L.A. Daily News (275,000).

c) Travel Writers: Many of the 250 freelance writers in this territory are regularly featured across the country. Among these, 101 are active members of the Society of American travel Writers (SATW). Some fifty of the freelancers are members of the Outdoors writers Association of America, 24 are members of the U.S. Ski Writers Association, and 43 are members of the International Food, Wine and Travel Writers Association. Others are also members of such groups as The American Society of Journalists and Authors and the Travel Journalists Guild.

d) Future Plans: Much of the Visit Canada Program (Media) is conducted with professional, productive freelance writers who contribute not only to local publications such as the Los Angeles Times, but also on a regular basis to such dailies as the Chicago Tribune, Chicago Sun Times, Miami Herald, Christian Science Monitor, San Francisco Examiner, Detroit Free Press, Boston Globe, etc. as well as major national and international magazines. Some local freelancers also work with the Copley News Service based in San Kiego, whose services extend to 275 papers nationally, as well as with other syndicates. Many of these writers also produce guide books, travel books, videos, and host radio and television travel shows.

Over past years this office has been very successful in generating tourism coverage for Canada in most types of print and electronic media. As our database expands, we expect to reach many more media interests, thus permitting even more specific niche marketing. This office does have a full-time tourism media officer who is a member of SATW. It is expected, that with continuing close cooperation of the provinces/territories and the Canadian tourism industry, Canada will be able to expand public relations activities to maximize the growth opportunities offered by the Western travel market.

To help Canada achieve its public relations objectives, and the industry to reach marketing goals, the Canadian travel industry are encouraged to forward new product information directly to this office. Such information may be accompanied by press-releases, black and white glossy photographs, colour slides and videos if available. Also helpful is information relating to any direct media activity or contact initiated by Canadian tourism interests into the South Western United States so that duplication of effort may be minimized.

A West Coast Canada Media Marketplace was held in May 1991 in Los Angeles for the second time, drawing 130 high-caliber media from the Consulate territories of Los Angeles, Seattle, San Francisco and Dallas. The Media Marketplace this year is to be held at the Century Tower Hotel, Century City, Los Angeles, from April 29 to May 1, 1992. This year, the event will target key members of the travel/leisure media west of the Mississippi.

4. Meetings, Conventions and Incentive Travel

a) General: with the prospect of continuing increases in commercial activity of all kinds in the South West, the outlook for significant growth in MC&IT business in the medium to long term is extremely promising. Given the growing supply of convention centers and meeting facilities in Canada and the significantly higher per person revenue generated by business visitors (compared to vacation travel), this is an area of the tourism market that will attract increasing attention in the future.

b) The Corporate and Associations Market: The California almanac lists nearly 300,000 businesses in Southern California alone, while there are some 3,000 associations. The prospect database held in this office is regularly updated (through mail survey and telemarketing methods) to provide the Canadian Tourism industry with qualified leads and to notify them of any important changes in the profiles that have already been forwarded. Currently, some 840 corporate and association contacts who have the potential to meet in Canada are listed in the database. The strategic marketing approach to this very specialized segment of the market is presently under review, and this may result in a greatly enhanced concentration of effort on a smaller number of key prospects.

c) The Incentive Travel Market: In the Los Angeles Post area, there are a large number of incentive travel planner. Although the East Coast remains the pre-eminent area of Incentive Travel activity in the United States, Southwestern clientele for incentive travel business to Canada has steadily increased over recent years. Presently, this office has some 80 incentive travel planners interested in using Canada as a destination for their groups, listed on database.

d) Future Plans: This office has an active and qualified selection of business travel influencers planned to participate in Canadian site inspections throughout the coming year to most regions of Canada. Several highly targeted seminars are scheduled to be held in Los Angeles during the year.

Hotel properties may contact their Los Angeles based representatives to receive prospect lists resulting from these and other promotions.

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Tourism Personnel

Bruce D. Verner, Consul & Trade Commissioner/Tourism **(Ext. 214)** Program Manager, also responsible for Media; Corporations - MC&IT; Airlines; Outdoor/Adventure market

E.P. "Ernie" Konstas, Commercial Officer/Tourism **(Ext. 211)** Responsibilities: Meetings, Conventions & Incentive Travel (except corporations); Wholesalers and Tour Operators; group travel influencers

Pam J. Loberg, Travel Trade Assistant **(Ext. 212)** Responsibilities: Retail travel trade, AAA auto clubs; Ski market Administrative support

Territory Served by the Minneapolis Canadian Consulate General are

Minnesota
Nebraska
Montana

North Dakota
South Dakota
Iowa (except Quad Cities)

Population 11.8 million

This six-state territory, while sparsely populated, is one of the strongest and best-balanced regional economies in the U.S. and hence, represents an important market for Canada.

In area, the territory represents 14 percent of the U.S. but it contains only 4.5 percent of the nation's population. Its density is only 21 people per square mile (compared with 64 for the entire country), ranging from 50 people per square mile in Minnesota and Iowa, to 5.5 in Montana. About a fifth of the total territory population is in the Twin Cities metro area of Minneapolis/St. Paul (pop. 2.45 million). Add Omaha/Lincoln (348,000) and Des Moines (260,000) and you've got nearly a third of the total territory population.

Agriculture, natural resources and high technology are the basis for the economy of the territory.

Assistance Available from Post

Market intelligence
Counselling to travel industry
Assistance in coordinating activities in territory
Sales leads/referrals
Joint promotions/seminars
WIN Tourism Database

CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN TERRITORY

Touring/City

As in past years, there has been an increase in new tours to Canada, particularly city packages to Montreal and Quebec City. The "Mystery Tour" concept has proven very successful in this area as a method to introduce new tours and the potential for short 3-4 day trips in high. For example, several new tours were developed to Minaki Lodge and Thunder bay, Ontario. With the senior citizens market now the second largest in the United States, many new opportunities to target this audience now exist in the territory. Two travel shows, GLAMER (Group Leaders of America) and Senior Options, (both held in the Twin Cities - fall), offer exposure to this emerging market segment. Also, an annual educational familiarization tour, specifically for group leaders, has been organized by a local Tour Operator during the past two years, with proven results.

Outdoor/Adventure

There are approximately 35 major sportshows in our territory including those that also market boats, motors and fishing equipment, the largest being the greater Northwest Sportshow, every March in Minneapolis. To date, there are over 250 Canadian exhibitors and the average attendance is 150-200,000 people. In addition, the All-Canada Outdoor/Adventure Vacation Show features Canadian-exclusive product. In past years, this show was only in the Upper Midwest area (Michigan, Illinois, Missouri, Nebraska, Wisconsin, Minnesota). In 1992, the organizers have expanded to include Denver, Colorado.

Skiing

Destinations currently being offered are Whistler/Blackcomb and Banff/Lake Louise. Riding on the coattails of these two successful trips, consideration will be given to Jasper and Kananaskis for 1992/93 only if the airfares are competitive with those to U.S. areas such as Vail and Aspen. In the past, this has been the biggest obstacle to promoting Canadian ski destination.

Meetings, Convention and Incentive Travel

In this territory are 26 Fortune 500 industrial companies, 22 Fortune 500 service companies and 16 of Forbes' 400 largest private companies, including the largest. There are an estimated 600 companies with designated meeting planners, plus 250 national and international association headquarters (150 trade and professional; 100 avocational).

MEETINGS, CONVENTION & INCENTIVE TRAVEL

The Corporate and Association Markets

In our MC&IT Data Bank which is updated annually, we have profiles on 576 organizations corporate and association, (qualified leads can be made available). Of these, 459 have potential to meet in Canada and 177 will not or cannot meet in Canada ("negative response" files).

The Incentive Travel Company Market

The Twin Cities area is a very important incentive industry center in North America. Of critical importance is The Carlson Companies, headquartered in Minneapolis -- one of the largest privately-held companies and travel organizations in North America. It includes such firms as Carlson Marketing Group (formerly, E.F. MacDonald Travel -- the biggest incentive travel firm in the world), GTD (formerly GTU), Radisson Hotels, Carlson Travel Network (formerly, Ask Mr. Foster -- a major retail travel chain in the U.S.) and P. Lawson (the Canadian retail travel agency chain). Other significant meeting and incentive travel companies headquartered in the territory include Business Incentives, Northwestern Incentive Services, World Travel and Incentives and Graham Marketing Group (headed by S.I.T.E. President Richard Graham), all in the Twin Cities, and ITA in Des Moines. In addition to 25 such firms in the territory, there are many smaller, very productive companies.

Upcoming Special MC&IT Promotions

"Showcase Canada" Marketplaces

April 8, 1992 - Des Moines, Iowa
April 9, 1992 - Minneapolis, MN

TRAVEL TRADE

There are approximately 1250 retail agencies, 80 AAA Clubs, 48 Wholesalers/Tour Operators, and 128 Group Leaders/Senior Citizen Clubs in our six-state territory. In 1991, 75 new or significantly-modified Canada packages were developed and, in total, there are 301 tour programs offering Canada product from this territory.

Of the Wholesalers/Tour Operators:

65% operate a combination of air/motorcoach tours;
33% are exclusively motorcoach;
2% include motorcoach/rail product.
28% do pre-formed groups only

Future plans/promotional opportunities

The Minneapolis Canadian Consulate General works very closely with Wholesalers/Tour Operators, updating Profiles (copies of which can be made available), maintaining a high profile by yearly sales call visits, producing new product/development mailings, coordinating participation in Rendez-vous Canada and smaller, regional marketplaces (Alberta reverse Marketplace, "Bienvenue Quebec"), and familiarization tours under the Visit Canada (Trade) program. Both our knowledge of their operations and tour offerings and their familiarity with our office has proven most effective when considering joint projects/initiatives.

As well as the above, this office coordinates two major travel trade promotions as follows:

"Travel Canada"

February 18, 1992-Bismarck, ND
February 19, 1992-Fargo, ND
February 20, 1992-Duluth, MN

"Experience Canada"

March 16, 1992-Omaha, NE
March 17, 1992-Des Moines, IA
March 18, 1992-Rochester, MN
March 19, 1992-Minneapolis, MN

Ski Clubs & Outdoor/Adventure Markets

Skiing

The major ski market consists of 22 member clubs affiliated with the Minnesota Ski Council (MSC). Membership totals approximately 4,000 with the largest memberships at ULLR Ski Club and Sitzmark Ski Club, averaging about 750 members each. The MSC's main outlet with which to reach the largest number of members is the Minnesota Skier tabloid newspaper which contains stories on club activities and destinations, and advertising from suppliers in the ski industry such as sporting goods outlets, ski areas, hotels/motels/winter resorts, etc. There are 4 major functions at which to promote ski products in the Twin Cities, those being 1) the Ski, Snowmobile & Winter Sportshow (Minneapolis - November); the Tribune Travel Trade Show (Minneapolis - fall); Midwest Ski Extravaganza (Minneapolis - April); and Ski Group (Minneapolis - May).

Outdoor/ Adventure

This type of activity, mainly fishing and hunting, is very strong from this market. For example, based on a survey of visitors travelling exclusively for the fishing/hunting experience, one province reported that of 19,000 returns, 11,000 were from our six-state territory. This office currently maintains a data base containing hunting/fishing clubs and have these types of lists available. Also, Carlson Companies have established a new division called Carlson Outdoor Adventures to meet the increased demand for the outdoor experience.

MEDIA

While this territory is not a media center, it does have a number of very major outlets that the Consulate General works closely with producing substantial results in terms of editorial coverage for Canadian travel.

Major Publications

Better Homes & Gardens, published by Meredith Corporation in Des Moines, is by far the largest. Its circulation exceeds 30 million monthly. This office works closely with the magazine's Travel Editor and staff on development of stories on Canada. In 1991, this resulted in a six-page story on rail travel across Canada, including color photography, with a publicity value of $3.1 million.

Home & Away is published by AAA, based in Omaha, and has a circulation in excess of two million. It circulates to members of the auto club in ten states -- Minnesota, Iowa, Nebraska, North Dakota and South Dakota (all part of the Consulate's territory), plus Kentucky, Illinois, Indiana, Ohio and Oklahoma. This office has assisted the magazine's editor and staff on a number of articles, including an extensive piece recently on the Atlantic Provinces.

Daily Newspapers

Many daily newspapers have travel sections or carry travel features frequently. The four major dailies in this territory, and their circulations, are:

Star Tribune [Twin Cities]	625,504
St. Paul Pioneer Press Dispatch	247,492
Des Moines Register	364,727
Omaha World-Herald	290,197

Other Media

There are a total of 113 daily newspaper within the territory, 1300 other publications (including weekly community newspaper and monthlies such as Mpls/St. Paul magazine), plus 750 radio and television stations.

In-Fisherman magazine (circulation 283,000) which also publishes other outdoors publications, such as Angling Adventures; North American Fisherman (circulation 103,000) and North American Hunter (circulation 237,000) are also based in this territory. These internationally circulated publications have substantial interest in Canada. There are many other international, national, and local outdoor publications in the territory, including Waterfowl magazine. In addition, Babe Winkelman, host of the 90-station syndicated television show, "Good Fishing" and his production company are also based in Minnesota.

Freelancers

Among the most productive efforts by this office is work with some twenty, very prolific freelance writers, photographers and television production companies. In the past year, this has resulted in placement of copy on Canada in such publications as Ladies Home Journal, and Providence Sunday Journal, among others, all based outside this territory. In addition, we work closely with a number of production companies such as Schara Productions, North American Outdoor Adventures, and Babe Winkelman Productions, resulting in fishing and hunting videos on Canada.

How we assist

Assistance to travel and outdoor media offered by the Consulate can include one or more of the following: financial assistance to visit a Canadian destination for editorial research (Visit Canada Program); itinerary planning through coordination with provincial/municipal media officers, etc.

CANADIAN CONSULATE GENERAL/TOURISM

1251 Avenue of the Americas
16th Floor
New York, NY 10020-1175

Phone: (212)768-2400
(212)768-2442 (Recorded Tourism Information)

Telex: 62014481 (DOMCAN NYK)

Fax: (212)768-2440

Tourism Personnel

John Kern, Consul & Trade Commissioner - Tourism. Program Manager; also responsible for liaison with United States Tour Operators Association

Patricia Boyer, Commercial Officer - Tourism. Deputy program Manager; also responsible for Business Travel (meetings, conventions and incentive travel)

Lois Gerber, Commercial Officer - Tourism. Responsible for media (including Outdoor media)

Vacant, Commercial Officer - Tourism. Responsible for travel wholesalers/operators, transportation companies and market intelligence reporting

Barry Goold, Commercial Officer - Tourism. Responsible for travel agents, auto clubs, senior citizens and outdoor product (excluding outdoor media) and special interest group

Zita Gabaldon, Administrative Assistant - Tourism.

Fides Asistin, Administrative Assistant - Tourism.

Territory Connecticut, New Jersey, Southern New York (Albany, south to the New York border) and bermuda

Population 24 million (estimated)

The New York, New Jersey and Connecticut tri-state area plays a significant role in bilateral trade with Canada, accounting for over $20 billion annually.

Population figures by State: New York (Consulate territory) - 12.9 million, New Jersey - 7.8 million, Connecticut - 3.3 million and Bermuda - approximately 58,000. New York City being the largest city in our territory, with a population of 7.1 million, is also the business and media capital of the United States.

Assistance Available from Posts

Market intelligence, sales leads/referrals; counselling to travel industry; assistance in co-ordinating planned joint promotions/seminars and other activities in the territory; WIN Tourism Database and use of office facilities.

CANADIAN PRODUCT DEVELOPMENT POTENTIAL IN THE NEW YORK CONSULATE GENERAL TERRITORY

Touring/City

The major tour wholesalers and operators headquartered in this territory continue to feature Canadian tour packages. They, however, are looking to expand their programs to new destinations or include unique components in their tour packages.

There is also potential for increased business opportunities with inbound wholesalers/operators located in this territory, especially the Japanese market.

Senior citizens are an important element of these segments and will require programs specifically designed for their needs/tastes.

Development of Art & Cultural tourism related programs would offer the Canadian Industry increased sales opportunities in this market.

The Canadian Industry is well situated to penetrate these segments. However, it is important that suppliers be pro-active in this market. They must be willing to work with the U.S. Industry in providing them with competitive pricing and market intelligence on new products. Consideration should be given by the Canadian suppliers in making direct sales calls and participate in major travel shows held in this territory. (List of these shows available through the Consulate.)

Outdoor/Adventure

Given the Population base in this territory and the recent interest in Outdoor/Adventure products (including soft adventure packages), Canada has an excellent opportunity to penetrate these segments. The Canadian Industry should consider participating in the major Outdoor/Adventure shows that take place in this territory (list of shows available through the Consulate). They should also ensure that the U.S. Industry are kept apprised of new developments in the Canadian Tourism Plant and that their product knowledge be expanded.

Skiing

The ski destinations which hold the best potential from this market area are: Laurentians, Quebec City area, Eastern Townships, Canadian Rockies, Whistler, Blackcombe and the Interior of British Columbia. The various ski shows held within this territory offer excellent marketing vehicles (list of shows/marketplaces available through the Consulate).

Business Travel (Meetings, Conventions & Incentive Travel)

Canada is in an excellent position to attract Business Travel (meeting, convention and incentive travel). This is due to Canada's proximity from this market, foreign appeal, diverse culture, clean and safe cities, friendliness and a favourable exchange rate. Additionally, our meeting/convention facilities and services are at a par with competing destinations.

The economic growth in the U.S. has slowed with corporations facing the challenge of maintaining their financial position in the market place. Spending has been curtailed with alternative cost saving measures being examined. Canada could have an advantage here in that corporations who generally hold meeting outside the U.S. may be looking closer to home (North America) for meeting sites. Additionally, smaller and more frequent strategy meetings may be required by corporations to maintain their economic position in current market conditions. These meetings would be held in addition to the larger annual or board meetings.

An excellent opportunity for the Canadian Meetings Industry, to penetrate this market, is to consider participating in the major shows/marketplaces held within this territory (list of shows/marketplaces available through the Consulate).

MARKET PROFILE AND PROMOTIONAL OPPORTUNITIES

Travel Trade

Travel Trade Profile

There are over 500 tour wholesalers/operators located in our territory, of which approximately 250 actively sell Canada. In addition, there are over 4500 retail agents (approximately 40% sell Canada), 8 auto club organizations with a membership of approximately 2.2 million, 10 cruise companies, 12 on-line air carriers flying to Canada, one Canadian off-line carrier, one rail organization and one scheduled bus company.

Travel Trade Future Plans/Promotional Opportunities

The New York Consulate General will undertake the following activities: continue to identify new leads and update profiles on major tour wholesalers/operators; operate, in co-operation with the Canadian Industry, VCP (Trade) programs and familiarization/product testing tours; assemble and disseminate market intelligence to the Canadian Industry as well as provide new product data to the U.S. travel market;

develop, in co-operation with the Canadian Industry and major U.S. wholesalers/operators, a series of educational training seminars for Canadian product distributors.

The Consulate will co-ordinate and participate in several major shows/marketplaces in 1992 (a list of the shows/marketplaces is available through the Consulate).

Media

New York is the print and media center of the world. The majority of all major networks are headquartered in this territory. The travel media is composed of over 200 magazines devoted specifically to travel; 80 daily newspapers; 380 weekly publications; 265 radio and 150 TV stations; as well as hundreds of freelance writers/photographers (list of media contacts available through Consulate).

Media - Future Plans/Promotional Opportunities

This office will undertake the following activities: continue to identify new contacts and update our media profiles; arrange, in co-operation with the Canadian Industry, VCP (Media) individual/group site inspection tours; assemble and disseminate market intelligence to the Canadian Industry; provide product knowledge to the U.S. media; develop and co-ordinate, in co-operation with the Canadian Industry, the New York Dateline Canada/Media Marketplace, as well as other targeted media promotions.

> Our major media activity will be: Dateline Canada/Media Marketplace, March 11-12, 1992, New York City.

Business Travel (Meetings, Conventions & Incentive Travel)

Business Travel (MC&IT) Profile

The Association Market: Approximately 2,000 associations are located in the New York territory. Over the past several years associations have been relocating out of New York to New Jersey and Connecticut as well as a large percentage moving to Washington, D.C.

The Corporate Market: The New York territory, with some 450,000 corporations, continues to be the corporate center of the world. Over 200 of the Fortune 1000 are located within this territory. This, no doubt, represents the greatest market potential for Canada. Major industries include: banking, finance, communications and retailing. For New York corporate meeting planners, destination is the most important factor in the selection of a meeting site, followed by accessibility by air, cost, facilities and services.

The Incentive Market: According to the Society of Incentive Travel Executives, insurance companies are the top industry users of incentive travel. The largest concentration of insurance companies are in the Eastern Corridor. This could be a lucrative market for Canada since incentive trips are generally high yield business. There are 50 incentive planners/organizations located within this territory.

Business Travel (MC&IT) - Future Plans/Promotional Opportunities

The Consulate will undertake the following activities: continue to identify new contacts and update our Business Travel (MC&IT) profiles; arrange, in co-operation with the Canadian Meetings Industry, individual and group site inspection tours; assemble and disseminate market intelligence and generate new leads for our Canadian colleagues; provide product knowledge to the U.S. MC&IT market; develop and co-ordinate major Business Travel (MC&IT) promotions/marketplaces in the territory. They include:

February 20, 1992 - "We Love New York" Day, New York City June 18, 1992 - "Showcase Canada", New York City

Outdoor/Adventure

Outdoor/Adventure Profile

Over 220 outdoor/recreation clubs have already been identified as being located in this territory. The outdoor/adventure media in this market are also highly enthusiastic supporters of these segments.

Outdoor/Adventure Future Plans/Promotional Opportunities

The Consulate will undertake the following activities: continue to identify new contacts and update our Outdoor/Adventure profiles; arrange, in co-operation with the Canadian Industry, VCP (Media)/VCP (Trade), familiarization tours; assemble and disseminate market intelligence to the Canadian Tourism Industry, as well as provide new product knowledge to the U.S. marketplace; develop, in co-operation with the Canadian Industry, a series of educational training seminars.

Ski

Ski Profile

50,000 skiers hold active membership in the various ski councils situated within our territory. In addition, over 100 major companies have ski clubs affiliated with their organizations.

The media is also a strong supporter of our skiing product.

Ski Future Plans/Promotional Opportunities

This office will undertake the following activities: continue to identify new contacts and update our ski profiles; arrange, in co-operation with the Canadian and U.S. Tourism Influencers, familiarization/product testing tours; disseminate market intelligence to our Canadian colleagues; provide the U.S. ski market with new Canadian product knowledge; develop, in co-operation with the Canadian Industry and U.S. ski influencers, a series of educational training programs.

OTHER CANADIAN PROVINCIAL REPRESENTATION IN THE TERRITORY

Alberta
Ontario
Quebec
Saskatchewan

FOREIGN GOVERNMENT TOURISM OFFICES LOCATED WITHIN THE TERRITORY

Over 60 foreign countries have tourism representatives located within the New York territory.

CANADIAN CONSULATE GENERAL/TOURISM

50 Fremont Street, Ste 2100
SAN Francisco, California 94105

Phone: (415)495-6021

Telex: 0034321 (DOMCAN SFO)

Fax: (415)541-7708

Travel Trade/Media (415)543-2309

Tourism Personnel

Mr. Al Lyons, Consul and Trade Commissioner

Mr. Jim Norwood, Commercial Officer (Travel Trade/Media)

Ms. Gay Wittenberg, Secretary

Office Hours 09.00 - 13.00 Pacific time
14.00 - 17.00

TERRITORY OVERVIEW

State and Population

Northern California	11,600	Nevada	1,054
Colorado	3,301	Utah	1,690
Hawaii	1,098	Wyoming	490
Total	19,233		

quoted in (000) thousands, 1989 est., US Census

The territory comprises of a six state region which includes portions of the most populated and least populated states of the Union. The population of California alone is larger than the entire population of Canada. Today, California is recognized as the seventh largest economy in the world.

The region comprises of 11% of the land mass of the US and 8% of the population. The major metro centres of the territory include San Francisco/Oakland/San Jose, California; Denver, Colorado, Salt Lake City, Utah; Sacramento, California and Honolulu, Hawaii.

The economy of the region is derived from aerospace and high technology (computer software and hardware manufacturing and biogenetics), agriculture, tourism, and gas and mineral exploration.

POST ASSISTANCE

This post can assist your organization with marketing intelligence, counselling to the travel trade, coordinate activities within the territory, sales leads and referrals, joint promotions and seminars.

CANADIAN PRODUCT DEVELOPMENT POTENTIAL WITHIN THE TERRITORY

Touring/City

Due to the mild climate of California retirees from across the nation flock to the Golden State armed with their household goods and a recreational vehicle. For many it is an opportunity to travel at leisure. Several tour operators in this territory have identified the seniors market as an affluent market to lure visitors to Canada. Over the past several years group leaders have become an important extension to the tour sales office. Vehicular and escorted tour demands have increased in recent years to Canada due to seniors retiring to California and Colorado.

Over the past four years this office has made the commitment to develop the State of Hawaii travel market. Our demographics indicate that there is a strong potential for reasonable travel trade between Hawaii and western Canada for summer and winter programs. Several tour operators are doing quite well in providing ski packages to western Canada.

Outdoor/Adventure

There are several major outdoor sportshows held throughout the territory each year. One of the largest is the International Sportsman Exposition held each year in San Mateo, Sacramento, and Denver. Attendance at this venue hovers near the 150,000 mark. Canadian suppliers abound promoting their product and services to the potential American visitor.

Skiing

Right at the back door of San Francisco and Denver are two major skiing destinations; The Sierra ski villages, and the ski spots of the Colorado Rockies. Both of these destinations are strong competition to the ski slopes of Canada. Yet, within hours visitors from California or Colorado can be skiing at Whistler or the slopes in the Canadian Rockies.

Meetings, Conventions and Incentive Travel

The San Francisco Bay area has long been described as the financial capital of the West. Many of the Fortune 500 companies have corporate headquarters in this region, many who look to travel outside the United States for meetings and conventions.

Corporate and Association Markets

Our Meeting, Convention, and Incentive Travel data bank is updated periodically throughout the year. Currently we have profiles on approximately 400 organizations. Lists of qualified leads can be made available to qualified organizations in Canada.

Incentive Travel Market

This region is not a major incentive travel headquarter city, although the major companies who work in this market have offices in San Francisco, San Jose, and Denver.

TRAVEL TRADE

There are an estimate 4,000 retail travel agencies within our six state territory. In addition there are 95 Auto Clubs and approximately 35 secondary tour operators in the region.

The San Francisco Canadian Consulate General works closely with Tour Operators/Wholesalers, updating files (copies can be made available), new product/development mailings, Rendez-vous Canada participation and Visit Canada Program (Trade) site inspections/familiarization tours.

In addition we coordinate three major travel trade marketplace in the region. This information is located elsewhere in this profile under Tradeshows.

Skiing

Skiing organizations in this territory is an elusive market segment. Many colleges, universities, and corporations have ski clubs. Many of these organizations work from offices without telephones or addresses, yet we keep a list of the high profile clubs who are interested in international travel.

Outdoor/Adventure

San Francisco is a cultural setting with few hunters and fishing devotees. Yet to in Colorado, Wyoming and Utah these people abound. The demographics for this region indicate that fresh and salt water fishing in British Columbia is popular with visitors from all states in the region. Hunters prefer Alberta, Manitoba, and Saskatchewan, while canoeists travel to British Columbia, Manitoba and Ontario. These demographics significantly reflect the air corridors to Canada within the territory.

Over the last few years this office has seen a strong interest in soft adventure travel. With the Sierra Club headquartered here in San Francisco they have led the mind set to combining outdoor travel with environmental issues.

MEDIA

Over the last several years this office has identified a large number of free lance travel writers who periodically write about Canada. Canada has become a major destination for electronic media, partly due to the scenery and travel opportunities north of the border.

Major Publications

Sunset magazine, published by Lane Publications in Menlo Park, California is probably the best know publication in the territory. Their circulation of 1.7 million copies is distributed monthly throughout the 11 western States.

Motorland magazine, published by the California State Automobile Association has a circulation just over 2 million, and is distributed throughout Northern California and Nevada. This office works closely with Motorland editorial staff to develop an ongoing supply of articles on Canada.

Assistance to travel and outdoor media offered by the Consulate can include one or more of the following: financial assistance to visit a Canadian destination for editorial research under the Visit Canada Program/Media; itinerary planning and arranging; editorial contacts; research assistance; supply photography from our library or other sources in Canada, and coordination with provincial and municipal media officers.

PRINCIPAL METRO CENTERS IN TERRITORY

	(A)	(B)	(C)
1. San Francisco*	(05)	6,000,000	+ 6.2%
2. Denver	(20)	1,800,000	+ 6.3%
3. Sacramento	(29)	1,500,000	+ 6.2%

4. Salt Lake City	(35)	1,200,000	+ 6.7%
5. Honolulu	(43)	1,100,000	+ 4.7%
Total		11,600,000	

(A) Current national ranking

(B) Current population

(C) Population growth in the last two years

* Includes Oakland/San Jose/Bay Area

SOURCE: US Census Bureau, 1987

CANADIAN CONSULATE GENERAL/TOURISM

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Telex:	32-8762 (DOMCAN SEA)
Fax:	(206)443-1782
Consulate hours of business:	8:00 am to 4:30 pm Pacific Time Monday to Friday

Tourism Programme Personnel

Robert Brown, Tourism Programme Manager
- Responsible for the development and implementation of a comprehensive tourism marketing programme by overseeing all promotional activities undertaken within the travel trade, media and business travel sectors of the Canadian tourism industry. Coordinates all federal/territorial and private sector liaison.

Ken Erickson, Tourism Marketing Officer - Travel Trade
- Responsible for travel trade development and promotion including dealings with airlines, cruise lines, rail and motorcoach companies, tour wholesalers and operators, automobile clubs, retail travel agencies and seniors organizations. Plans joint marketing initiatives to encourage the development of new Canadian travel products.

Jill Seidel, Tourism Marketing Officer - Business travel (MC&IT)
- Responsible for the development of the meetings, conventions and incentive travel market within the Post territory. Works with meeting planners, chief executive officers, associations, corporations and special interest groups to develop business travel to Canada.

Hilda Cullen, Tourism Marketing Officer - Media
- Responsible for increasing the exposure of Canada's tourism products by working closely with the print and electronic media within the Post territory. Coordinates special promotions and prepares a travel industry newsletter.

Erinn Brennagh, Tourism Administrative Assistant
- Provide administrative support to the Tourism Programme.

Territory - The Pacific Northwest states of Washington, Oregon, Idaho and Alaska

Population

Washington	4,419,000
Oregon	2,656,800
Idaho	1,017,100
Alaska	523,700
TOTAL	**8,616,700**

Most of the territory's population is concentrated along the I-5 corridor of Washington and Oregon west of the Cascade Mountains including the metropolitan areas of Seattle and Portland. This region has experienced a buoyant economy in recent years based on aerospace and high-technology industries. The rest of the Post territory, including eastern Washington, eastern Oregon, Idaho and Alaska, is quite sparsely populated and is dependent on natural resource based economics (logging, agriculture and oil) which have struggled off and on in recent years.

PARTNERS IN TOURISM

Virtually all promotional activity undertaken by the Tourism Programme involves partnership. This can include funds, personnel, materials and the sharing of timely market intelligence with both the public and private sectors of Canada's tourism industry. In this way, the limited resources of individual partners can be combined to create greater impact on the market.

Each Tourism staff member is familiar with the travel industry in the Pacific Northwest. They can assist in providing tourism market intelligence information, setting up appointments, identifying useful and appropriate travel trade shows, supplying lists and profiles of contacts in the territory, and providing counselling on a variety of promotional activities which may be pursued by members of the Canadian tourism industry.

Site inspection visits and familiarization tours to Canadian destinations are frequently arranged to enable U.S. travel influencers to experience Canada's tourism product first-hand. Travel influencers may include tour operators preparing new itineraries, writers on assignment to do an article, meeting planners looking for a convention site in Canada. Again, visits are heavily dependent on the assistance of the Canadian public and private sectors.

The Consulate General co-sponsors a variety of activities within its four-state territory. These promotions involve participation in trade shows, product launches, industry mailings, etc. Typically used promotional techniques may include such venues as receptions, seminars, breakfast meetings and sponsoring conference breakouts. We are always open to suggestions.

Names and profiles of all contacts in the Post territory have been imputed into the WIN Tourism data bank under the Travel Influencer, Media and MC&IT sectors. Our staff can supply pre-qualified computerized lists, which are being continually updated, to Canadian suppliers interested in this market. Lists include travel agencies, tour operators/wholesalers, automobile clubs, senior groups, ski clubs, freelance writers/photographers, newspapers, magazines, radio and televisions stations, meeting planners, and more.

Don't hesitate to contact any member of our staff for assistance. When in Seattle, we encourage Canadian tourism industry representatives to include the Consulate General in their sales calls. It is best, however, to arrange appointments in advance by calling (206) 443-1777. With advance notice, office space may even be available for use during the day to make local telephone calls, etc.

The Province of British Columbia has maintained a tourism sales and information office in Seattle for a number of years catering to the Pacific Northwest market. All provinces and territories have toll-free tourist information lines (except Yukon which is a toll call) available from this region to service both consumers and the travel industry.

SECTOR PRODUCT DEVELOPMENT POTENTIAL

Travel Influencers

The Seattle Post territory is home to about fifty tour wholesalers/operators including several nationally-marketed tour companies regularly featuring Canadian itineraries - Holland America Line Westours, Princess Tours, Brennan Tours and Society Expeditions. Although most packages originating here are to Western Canada, there is growing interest in developing new products to Eastern and Northern Canada. For example, Princess Tours and Brennan Tours both have developed new package tours to Ontario/Quebec and to Atlantic Provinces. As well, there is considerable interest in "soft" outdoor adventure products available in all parts of Canada.

The Tourism Programme plays a major role in identifying new product opportunities and working with Canadian ground handlers, hotels and attractions, and stimulates the development of new packages by local tour operators, motorcoach companies, airlines and cruise companies.

Air connections to Canada from the territory have improved in the last few years. Air BC, Time Air and Horizon Air have extensive services between Seattle (and Portland) and Vancouver and Victoria. Thai Airways International now flies non-stop flights between Spokane and Vancouver. Horizon Air has applied to operate non-stop Seattle-Calgary service. A major drawback to developing more tourism packages to Eastern Canada, however, continues to be the relatively high cost of air travel across Canada. The outcome of the "open-skies" bilateral talks between the U.S. and Canadian governments could have a major impact on the future of air transportation from this region to Canada.

There are approximately 1,100 retail travel agencies in the territory - 590 in Washington, 300 in Oregon, 150 in Alaska and 60 in Idaho. As elsewhere, there is an increasing trend towards mergers of agencies in order to obtain more clout with travel suppliers. There are also 47 AAA branch offices in the four state region with 610,000 members.

Major Tour Operators/Wholesalers in Territory:
- Holland America Westours; Princess Tours; Brennan Tours; Joseph van Os Nature Tours; Gray line of Seattle

On-Line Air Carriers From Territory to Canada:
- Air Canada/Air BC; Canadian Airlines International/Time Air; Horizon Air; United Airlines; Continental Airlines; Delta Airlines; Thai Airways International; Lake Union Air; Kenmore Air

Motorcoach Companies to Canada:
- Greyhound; Gray Line of Seattle; Empire Lines; Alaska Coachways; Cascade Trailways

Cruise/Ferry Companies Based in Territory:
- Holland America Line; Society Expeditions; Clipper Navigation; Black Ball Ferries; Washington State Ferries; Alaska Marine Highway System; Gray Line Cruises

Media

A large number of travel writers and photographers make the Pacific Northwest their home. Our Media data bank currently lists over 320 freelance writers, photographers, newspapers, travel publications, fishing and outdoor publications, radio stations and television stations.

Media (numbers):

Radio Stations	350
TV Stations	45
Newspapers(daily)	60
(weekly)	250
Magazines(national)	12
(regional)	46
Freelance Writers/ Photographers	170

The office works closely with these media representatives to promote wider coverage of Canada's tourism products. We will coordinate visits to selected destinations (VCP Media programme) in cooperation with the provinces/territories and private sector. In 1990, a total of over $2.3 million CDN in equivalent advertising value from magazine/newspaper articles published and radio/television coverage aired can be directly attributed to our office's media efforts. Of course, this return on media visits to Canada will continue to grow considerably as more material is published or aired over the next couple of years.

Other assistance is given regularly to the media in the form of research assistance, providing Canadian contacts, itinerary assistance, supplying photographs from our photo library, and more.

Our office produces a quarterly Canada Tourism newsletter which is distributed to approximately 2,000 travel agencies, tour operators, media and meeting planners in the Pacific Northwest. Each issues highlights a specific Canadian travel theme of interest to the tourism industry. Past issues have included rail travel, boating, cultural tourism, vacations of the mind and body, cross-country skiing, golf, famous gardens of Canada and performing arts destinations. Each province/territory is solicited for input to this newsletter on a regular basis.

Major Magazines Published in Territory:

- Alaska Airlines Magazine (in-flight); Compass Readings (Northwest Airlines in-flight); Bus Ride; Canoe Magazine; Trout Magazine; Flyfishing Magazine; Pacific Northwest Magazine; Northwest Travel

Major Daily Newspapers in Territory:

- Seattle Times; Seattle Post-Intelligencer; The Oregonian (Portland); Spokane Spokesman-Review; Boise Idaho Statesman; Anchorage Daily News; Anchorage Times; Tacoma Morning News Tribune

Business Travel (Meetings, Conventions and Incentive Travel)

The Seattle/Puget Sound area of Washington and the metropolitan Portland region have seen little of the recession that has affected much of the rest of the United States in 1991. These two areas' growth industries are high-tech computer software firms, advanced medical equipment, and aeronautics and its related industries. As well, the positions of Seattle and Portland relative to the Pacific Rim is a growing factor in a buoyant economic profile.

The entire territory has approximately 3,070 registered associations, not including religious groups. There are 74 national trade and professional associations headquartered here. Also headquartered in the territory are 1,379 corporations with annual sales of over $10 million U.S.

"Fortune 500" Largest U.S. Industrial Companies Headquartered in Territory (1990):

- Boeing Co., Seattle, WA (#13)
- Weyerhaeuser, Tacoma, WA (#54)
- Boise Cascade, Boise, ID (#118)
- Paccar, Bellevue, WA (#161)
- Willamette Industries, Portland, OR (#219)
- Burlington Resources, Seattle, WA (#221)
- Louisiana-Pacific, Portland, OR (#227)
- Tektronix, Beaverton, OR (#276)
- Nerco, Portland, OR (#387)
- Longview Fibre, Longview, WA (#430)
- Pope & Talbot, Portland, OR (#491)

"Fortune 500" Largest U.S. Diversified Companies Headquartered in Territory (1990):

- Nike, Portland, OR (#48)
- Morrison Knudsen, Boise, ID (#63)
- Univar, Seattle, WA (#76)
- Microsoft, Redmond, WA (#84)

"Fortune 500" Largest U.S. Retail Companies Headquartered in Territory (1990):

- Albertson's, Boise, ID (#14)
- Costco Wholesale, Kirkland, WA (#29)
- Nordstrom, Seattle, WA (#40)
- Fred Meyer, Portland, OR (#47)

Our MC&IT Data Bank currently has over 750 profiles on corporate and association contacts in the territory. Of these, more than 260 have been fully qualified as having an interest in meeting in Canada. New leads are regularly forwarded to the appropriate contacts in Canada for their follow-up.

Although this territory has few incentive travel specialty houses, incentive travel has been identified as an area of great potential in the corporate market. Our office hosted "The Great Canadian Getaway" incentive travel promotion in 1989 and again in 1990 featuring resort properties catering to this kind of market. Both suppliers and guests were very pleased with this activity and an expanded promotion is expected to be repeated in Fiscal Year 1992/93.

FUTURE PLANS/PROMOTIONAL OPPORTUNITIES

The Tourism Programme anticipates undertaking several new initiatives in the Business Travel sector. Electronic media coverage will continue to be a targeted area for growth and development to complement a well established print media base. New product development with wholesalers, airlines, cruise lines and motorcoach companies is the area receiving major emphasis during the 1991/92 fiscal year. New itineraries and destinations beyond the traditional urban market settings will be the outcome of the travel trade marketing thrust. The identification and packaging of the ever-expanding adventure travel product will continue.

CANADIAN EMBASSY TOURISM SECTION

501 Pennsylvania Avenue, N.W.
Washington, D.C. 20001

Phone: (202)682-1740

Telex: 0089664 (DOMCAN A WSH)

Fax: (202)682-7721

Tourism Personnel

Harry van der Veer, Commercial Counsellor, (Section Head)

Christelle Naumann, Commercial Officer (Meetings & Convention)

Frank LaFleche, Commercial Officer (Travel Trade & Corporate Travel)

Janissa Wagner, Secretary/Administrative Assistant

Brigitte Boucher, Secretary/Administrative Assistant

Territory Washington, D.C., Maryland, Virginia, Delaware and 32 counties on the eastern side of Pennsylvania.

Population*

Eastern Pennsylvania	8,400,000
Virginia	6,157,000
Maryland	4,729,000
Delaware	666,000
Washington, D.C.	614,000
Total Population:	20,566,000

* Statistical Abstract of the U.S.A. 1990
Department of Commerce

BUSINESS TRAVEL

Client Population: ASSOCIATIONS*

NATIONAL	REGIONAL	TOTAL	STATE
38	171	209	Delaware
2895	131	3026	Washington, D.C.
742	700	1442	Maryland
841	1965	2806	Pennsylvania
1202	927	2129	Virginia
5718	3894	9612	

Incentive contacts: 87 in greater Washington

Database profiles: (qualified)

1535 in greater Washington	872 can meet in Canada 609 cannot meet in Canada 54 multi-management firms
442 in greater Philadelphia	144 can meet in Canada 278 cannot meet in Canada 20 multi-management firms

There are up to 25,000 associations of a national scope in the U.S.A., or a total of 500,000 if state, regional and local associations are included.

The American Society of Association Executive's (ASAE) individual membership is more than 14,000, representing more than 7,000 national, state & local associations.

* Source: Gale Research - October 2, 1991

The Greater Washington Society of Association Executives (GWSAE) is an association for the Greater Washington metropolitan area association people. Members of GWSAE are located throughout the region, encompassing such suburban areas of Arlington, Alexandria, Bethesda, Reston, Rockville and Tysons Corner. Associations are the third largest industry in the Capital area following government and statewide organization headquartered in Harrisburg, PA. The Delaware Society of Association Executives (DVSAE) serves the Delaware Valley area (Delaware, lower New Jersey and greater Philadelphia.) All three organizations are allied with the American Society of Association Executives (ASAE).

According to Gale Research, Greater Washington is considered America's association center, with over 3,000 associations headquartered here, over 2,800 of which are major national or international associations.

Greater Washington represents 32% of the nation's share of associations and employs over 80,000 people. This compares with 15% for New York, 17% for Chicago and 36% for the rest of the U.S.A., among which there are pockets of concentration notably: Atlanta, Cleveland, Denver, Indianapolis, Los Angeles, Philadelphia and San Francisco.

Approximately 55% of the greater Washington area associations have budgets in excess of $1 million and 15% have budgets of over $5 million.

58% are located in the District of Columbia
28% are located in Virginia
14% are located in Maryland

Association and Multi-Management Markets

The qualification and re-qualification of associations & multi-management profiles within our territory is an on-going procedure. Our MC&IT database is updated on an ad hoc basis. "Canada's Call" is an annual marketplace/reception hosted in conjunction with Canadian partners in the meetings and conventions industry.

Corporate and Incentive Travel Market

The corporate and incentive travel segments in our market are currently being researched to identify the market potential. The majority of corporations are located in the states of Pennsylvania and Delaware.

Upcoming Special MC&IT Promotions

"Canada's Call" marketplace - November 7, 1991 in Washington, D.C.

This mission also collaborates on joint promotional activities or proposed by Canadian provinces or municipalities in support of their individual marketing efforts.

The mission maintains an active site inspection program for decision makers to help close sales for conventions site selection. Officers of the mission maintain professional memberships in relevant trade associations for the purpose of facilitating market access and flow of information beneficial to Canada's Convention industry.

City Tourist and Convention Bureaus established in Metro Washington: 37

Provincial Representation in Metro Washington: Quebec & Alberta

Canadian Cities Represented in Metro Washington: Ottawa, Toronto and Vancouver

TRAVEL TRADE

Of the 1,500 retail travel agents in the Washington, D.C. territory, approximately 325 actively sell Canadian destinations.

Tour operator/wholesalers

There are 145 tour operator/wholesalers in our territory; approximately 20 of these are major producers of Canadian tours. Approximately 350 tours per year originate from our territory.

Ski Market

There are some 80 identified ski clubs, with a total membership of 100,000. The largest club is the Washington, D.C. club which has in excess of 6,000 members.

CANADIAN PRODUCT DEVELOPMENT

Outdoor

There are two major sportsmen's shows in our area: Harrisburg, PA and Baltimore, MD. The dominant area of interest in the outdoor market is in the state of Pennsylvania, followed by Virginia, Delaware and the District of Columbia.

Touring

Areas of Canada included in 75% of the tours to Canada from our territory, in order of volume, are: Ontario, Quebec and Atlantic Canada. Shorter tours are selling better than long haul programs. There has been an increased interest in finding new activities at destinations, and new destinations within the standard provincial programs.

City/Culture

Our motorcoach operators are finding a greater interest in city tours that combine the visit with cultural activities which their clients can participate in.

Cruise Lines

There are 24 cruise lines represented in our territory, of which 5 include programs to Canada. Didion World Cruises will have cruises departing Alexandria, VA to Nova Scotia, the Province of Quebec and Prince Edward Island starting August 29, 1992 to September 19, 1992.

Air Carriers

There are a total of six on-line carriers to Canada from our territory:

- USAir
- Delta Airlines
- Lufthansa German Airlines
- Canadian Partner
- United Airlines
- Northwest Airlines

Non stop service to Canada provided by:

- Canadian Airlines - Harrisburg, PA to Toronto (Oct. 1/91)
- Canadian Airlines - Allentown, PA to Toronto (Oct. 1/91)
- Lufthansa Airlines - Philadelphia, PA to Montreal
- USAir - Baltimore, MD to Ottawa
- USAir - Allentown, PA to Montreal
- USAir - Philadelphia, PA to Montreal
- USAir - Philadelphia, PA to Toronto
- Business Express (Delta Airlines) - Washington, D.C. (Dulles) to Toronto

Connection to other points of Canada are available on:

United Airlines
Delta Airlines
USAir
Northwest Airlines

Rail Service

Amtrak - 2 trips per day from Washington, D.C. to Montreal

Scheduled Bus Service

Greyhound/Trailways to Montreal, Toronto, Ottawa and Vancouver

Motor Clubs - AAA

The are 25 clubs in our territory with a membership of 2 million.

Foreign Government Tourist Boards

Bahamas Tourist Office, Washington, D.C.
(Territory: Mid-Atlantic)

Mexican Government Tourist Office, Washington, D.C.
(Territory: Mid-Atlantic)

MEDIA

Some fifty of the major media contacts in this territory provide coverage ad exposure of tourism products, primarily through print, followed by local broadcast stations.

The following is a list of the major publications:

AAA World Magazine (Potomac Edition)	366,000/bi-monthly
The Baltimore Sun	1.2 million/Sunday edition
Changing Times	1.5 million/monthly
Destinations Magazine (Am. bus Assn.)	5,000/monthly
The Journal Newspapers	150,000/daily
Life in the Times	93,000/weekly
National Geographic Traveller	700,000/monthly
The Philadelphia Enquirer	1.0 million/Sunday edition
National Geographic Magazine	10.5 million/monthly
Richmond Times-Dispatch	260,000/Sunday edition
USA Today	1.7 million/daily
The Washingtonian	160,000/monthly
The Washington Post	1.2 million/Sunday edition
Washington Times	600,000/Sunday edition

Type of assistance provided by the Tourism Section of the Embassy

Trade contact lists;
Co-funding joint promotion;
Market intelligence;
Logistical support;
Association contact lists;
Advice on local customs;
Proposed Marketing plans; and
Coordination of events.

CANADIAN CONSULATE GENERAL/TOURISM PROGRAM

Immermannstrasse 65D
4000 Dusseldorf 1, Germany

Phone:	(211) 164 01 73
Telex:	858 7144
Fax:	(211) 35 91 65

Post Staff

Mr. Karl-Heinz Limberg, Commercial Officer - Tourism Program Manager: LES
Responsible for overall direction of Tourism Program's operational planning, program implementation and administration, staff direction and training, program coordination with Canadian and local partners, direction of outside contracted agencies. (HOP representational responsibilities now lie with the Consul General in Dusseldorf, Mr. Allan S. Poole).

(Position currently vacant), Commercial Officer - Assistant Program Manager: LES
Responsible for compilation and assessment of product base, including liaison and guidance for Canadian suppliers and wholesale/retail trade in FRG, planning and participation in Program's major promotional activities, supervision of Program's information services for trade and public, maintenance, updating and assessing need for all promotional/information materials.

Ms. Helga Mellin, Commercial Officer - Information: LES
Responsible for responding to the public and trade requirements on all travel-related matters, maintaining specific data base, identifying and assessing related consumer and trade trends, assisting marketing officer in planning and implementing major trade/consumer fairs, maintenance of up-to-date information response material.

Ms. Karen Robertson, Administrative Assistant: LES
Responsible for office administration, organization and communication, assisting with Program's promotional activities and with travel counselling for public and trade. Contact for Rendez-vous Canada.

Post contracted agencies

Advertising:
Gruppe Marketing & Werbung GmbH
Geleitsstrasse 14
6000 Frankfurt/Main 70

Phone: (69) 60 91 40
Fax: (69) 62 91 62

Mailhouse:
Lange Touristik Dienst
Alte Dorfstr. 21
6457 Maintal 2

Phone: (6109) 6 42 19
Telex: 4157009 lang d
Fax: (6109) 6 15 98

Assistance available from the Post

Market intelligence, sales leads/referrals, counselling to travel industry, assistance in coordinating planned joint promotions/seminars and other activities in the territory. Newsletters to travel trade, media selected partners in the industry, Public Affairs/Embassy (Bonn) and Tourism Canada/Ottawa.

Territory

Federal Republic of Germany

Population

Federal Republic of Germany: 78 million (after October 3, 1990*)

> *On October 3, 1990 the former German Democratic Republic acceded to the Federal Republic of Germany, increasing the German population by about 25% and the German territory by about 40%.

Situation Report: The Travel Market in Germany 1990

Economic Development

The German economy continues to show healthy signs of steady growth. The FRG's GNP is predicted to rise by 3.5% in 1991 (source: The Economist). For travel expenditures abroad this would mean an increase of ca. 5.6% because with every 1% increase in GNP, travel expenditures rise by 1.6%.

German reunification is believed to boost German economy in spite of its high costs. Unemployment in the former FRG is at 6.2% (Oct. 90). For the former GDR it is very difficult to obtain reliable data, as there are strong fluctuations and "hidden unemployment". The German Federal Government is expecting a total economic growth of an average 3% for 1990 to 1994 and an annual average increase in GNP of 6% for 1990 to 1994 (source: Economic Ministry, Projection for the German Economy 1990 to 1994).

FRG Travel to Canada

In spite of a slight decrease of German visitors to North America, Canada still ranks second after the USA as a long-haul destination with some 300,000 visitors/year. Increasing competition is originating from far eastern countries, such as Thailand, and African countries (Kenia, South Africa).

Compared to the USA, Canada has a competitive advantage for nature/scenery, safety, friendliness and cleanliness; a disadvantage in historical sites and buildings, museums and art galleries, shopping and public transportation.

Tourism Canada's objective is to maintain Canada's large market share in the outdoor sports segment, while increasing its share in the cultural touring and the sports and entertainment segment. A potential for market growth is perceived in promoting new and more diversified products, including shoulder season travel (e.g. winter sports).

Two trends can be identified: on one hand a demand for up-scale special interest packages, on the other hand a trend towards part services and tailor-made packages. Travellers have become more demanding and more flexible and independent.

Tourism in the former GDR

There are no official statistics available on the number of East German citizens travelling abroad. The number of persons travelling to the East European countries, excluding Yugoslavia, is estimated to have been around 6,000,000 annually in the 1980's. Travel to the West was practically forbidden for anyone but pensioners and the most "trustworthy" persons.

With the opening of the borders it became possible for East Germans to realize their dreams of travelling abroad. However, for most of them the former West Germany and other European countries are among their prime destinations. A vacation in Canada is regarded as a once-in-a-lifetime, not very inexpensive holiday. Activities on the East German market are therefore regarded as an investment in the future.

Key Partners associated with Post Activities

German Canada Committee (GCC): Air Canada, Canadian Airlines International, Deutsche Lufthansa, Government of Ontario, Government of Quebec, Government of British Columbia, Government of Alberta.
German travel trade.

CANADIAN HIGH COMMISSION
TOURISM PROGRAMME

Canada House
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England

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Fax:	071-321-0025

Tourism Personnel

Counsellor and Tourism Attache: Pierre-Andre Cusson
Executive Assistant: Sheila Smith
Commercial Officers:
    Travel Trade: Christopher King-walker
Public Relations/M&IT, Market Research: Jill White
Junior Officers:
    Media Relations: MaryEllen Collins
    Travel Trade: Jason Kee
    Secretary: Barbara Ulmer

Post contracted Agencies

Mailhouse:
Fulfilment Consultants Ltd.
The Old School House
Coolham
West Sussex, RH13 8QW

Travel Consultants:
Alfred Briggs
John Bolton
Pam Briggs

THE UK TRAVEL MARKET, 1991

Introduction

In February 1991 the prediction for 1991 summer travel was gloomy indeed. But the fears and hysteria that occurred during the Gulf War of a total travel industry embargo did not materialise. Although the economic recession has certainly taken its toll, the great British summer holiday is still alive, although scaled down in duration and distance to reflect the difficult financial times.

Economic Overview

The U.K. economy is in recession. The business information company Dun and Bradstreet reported in July 1991 that a total of 47,774 UK companies collapsed in 1991, a 65% increase over 1990. Unemployment has risen sharply over the past 13 months, with the number of unemployed standing at over 2.1 million at 7.6%.

The UK government forecasted a lowering of the inflation rate to 4% by the end of the year and their estimates were not too far wrong. Although inflation has dropped sharply from its peak of almost 11% in October 1990 to 4.7% in December 1991, it is largely related to the removal of the poll tax from the annual rate of inflation. Lowering inflation through fiscal restraint on spending is the government's top priority. Entry into the Exchange Rate Mechanism at the relatively high central rate of 2.95DM was designed to add discipline to monetary policy by linking sterling to low inflation currencies, notably the DM. However, it has resulted in the short term, in an unnaturally high UK interest rate at 10.50%, with little room to manoeuvre, unless the Pound is devalued within the bands of the ERM.

While there are some signs that the economy is bottoming out and some surveys of consumer and business confidence are encouraging, economic indicators are mixed, and some private sector forecasts are calling for output to be flat for the rest of 1992. The London Business School stated that while an economic recovery was on the way, it would not be strong enough to halt the rise in unemployment until the middle of 1993. On the other hand a recent Confederation of British Industry survey showed industry's confidence at its highest for 17 years.

A tense political combat is often tied to the various forecast, especially as a general election must be called before July 1991, with the Conservatives appearing to rally behind the date of April 9.
Given these indicators, it is not surprising that there has been a sharp decrease in consumer spending. The Christmas period was exceptionally slow, with pre-Christmas sales doing little to bring consumers into the shops. Retail shops are closing daily as consumer confidence has not yet returned. Even though mortgage rates have fallen the threat of unemployment looms high on the horizon.

The UK Travel Industry

The most recent Holiday Booking Audit is showing a decrease of 5% for 1991 bookings to date, while winter 91/92 bookings were up 16%, and the summer of 1992 is predicted to show a healthy increase of 51% overall.

As of January, 1992, tour operators were looking optimistically towards the summer of 1992 with January 1992 bookings ahead of January 1990 bookings. Early predictions indicate a 5-8% rise this year over 1991, which would put the market back to 1990's level. However, some industry watchdogs say that gloom and doom still prevails in the industry, and that the market upturn is due to special deals from operators and agents coupled by extensive advertising.

Travel agents, as well are noticing up to a 65% increase in business in January 1992, with short-haul holidays to Spain and the Spanish Islands accounting for a third of all bookings. However, the long-haul flight sector seems to be performing well with 59% recording an increase in bookings, a third of which were to the US. Long-haul package booking to Florida, Asia/Pacific the Caribbean, Kenya, Egypt and Canada are reported to be increasing over the Christmas period.

Travel Trend

The results of a recent survey undertaken by Mintel (a leading research company) on the UK holiday market, indicates that almost half of British families have not taken a holiday this year because of the recession. The remainder have spent £17 billion; more than 4% of all consumer spending. It is broken down: £6 billion for UK holidays and £11 billion for holidays abroad. One in ten adults took three or more holidays this year.

One in five British people only want to eat, drink and sunbathe on holiday; over one third like to go back to familiar places while nearly half try a different holiday every year.

Mintel predicts the following future trends: when the recession is over, there will be new and sustained growth in the number of people taking holidays. Fastest growth will be the overseas market boosted by EuroDisney and the Channel Tunnel which opens in 1993/4. UK destinations will find it increasingly difficult to compete for longer stay holidays. The short break market will continue its rapid growth, as will the long-haul market, with the USA and Australia benefitting. As a result, airlines will benefit from increase in total travel.

The Mintel report confirms that the more disposable income people have, the more they will be inclined to spend on travel. During the past difficult year many people have started to believe that the travel industry's boom years were over, that the dramatic growth enjoyed in the 80's had finally flattened out. However, it is widely believed that the travel industry still has significant growth potential.

The Association of British Travel Agents (ABTA) is predicting for 1992 a return to the 1990 figures of 10.5 million package holidays sold.

Canada's Position

Most UK tour operators dealing with Canada and scheduled airlines have indicated that their tour packages were slightly up in 1991. However, seats only operators experienced a substantial decrease as did charter operators.

The 1992 ski season numbers have exceeded 1991 figures, with operators indicating anything between 20%-100% increase in booking. There is also a larger number of operators featuring Canada as a skiing destination - total of 29, which is up from 16 in 1991.

At Canada House, there is a full consumer and trade enquiry centre. Public enquiries decreased 2.5% in the first 10 months of 1991. However, figures for December 1991 and January 1992 have already exceeded all expectations, with enquiries up over 25%. In addition, certain days in January experienced the highest number of inquiries ever at Canada House.

The Canadian Tourism Product

In 1992, 116 tour operators run some kind of Canadian programme, in addition to 20 who specialise in Canada but do not produce a brochure.

It is too early to undertake an in-depth analysis of the package offering availability for 1992 but we already know that the growth has continued in all sectors covering more activities in more provinces and in more seasons than in 1991.

In 1991, 609 packages were on offer from 130 UK and Irish based tour operators, an increase of 11% over 1990.

Traditional scenic tours continue to be the strength of the Canadian holiday market. This sector increased 8% in numbers from 1990 to 1991. City packages which are relatively new, have also shown a significant increase of 6% during the same period. This demonstrated the increase interest from the British public for our clean, safe and sophisticated urban centres. However, the largest growth area covered the outdoor recreation and adventure market, a 24% increase from 1990 to 1991, which is finally positioning nature as a driving force in marketing tourism to Canada. We are increasingly appealing to small niche operators. The primary activities of this sector are skiing and winter sports, canoeing and camping, fishing and wildlife. Other packages such as golfing, tennis, hiking, riding, biking, angling, etc., still hold great potential in the British travel market.

Packages targeting single provinces increased by 29% while multi-province packages expanded 2%. Joint USA-Canada packages grew by 10% perhaps reflecting an increased interest in two centre vacations.

All provinces, except two, and both territories experienced a growth in the number of packages targeting their areas in 1991. British Columbia topped the scales, with 319 packages, an increase of 12% over 1990. This was followed by Alberta featured in 242 packages (up 5%), and Ontario with 154 (the same as 1990). The largest increase in new packages was seen in the Atlantic provinces - Newfoundland up 69%, Nova Scotia up 61%, New Brunswick up 33% and Prince Edward Island up 25%. Both Canada's territories also saw significant growth in packages: Yukon up 33% and the Northwest Territories up 25%.

Conclusion

Despite the current doom and gloom of the economy, the UK public are still travelling, but primarily within Europe. The numbers of travellers to the USA are still increasing, but Canada experienced a slight decline in 1991, a total of 3% on 1990 figures.

Tourism Programme Activities

The Tourism Programme of the Canadian High Commission in London works closely with provinces/private sector partners and operators to educate agents on selling Canada to their clients.

The office is divided into two distinct sections: travel trade, which deals with all tour operators and travel agents; and public and media relations, meetings and incentive travel, market research and intelligence and administration.

Our activities for tour operators involve encouraging the development of new programmes offered in the UK. To educate operators about the products available in Canada, we organise educational visits, assist with agent or consumer promotions, and facilitate contacts between Canadian suppliers and UK operators.

It is no surprise that the major task of our programme is to educate travel agents about Canada, many of whom are ignorant not only about the country, but who do not know where to obtain relevant information. In conjunction with Air Canada we have embarked on an agent educational programme, entitled Canada Specialist Agents programme, which presently involves 82 travel agencies. These agencies received a special plaque and window sticker, and will be stocked with a full array of videos and other current destination information. They will receive regular newsletters and have the opportunity of participating in a number of specialist seminars throughout the UK. A listing of these agents is included in this briefing book.

This educational programme, combined with our ongoing work with operators and a highly viable trade and consumer advertising campaign, is geared to ensure that Canadian awareness is generated on several different levels. In conjunction with private sector partners, we will be continuing and increasing the frequency of our consumer and trade advertising campaign in the UK. In 1992 television advertising will continue in the London market, and the north-west, with the addition of the South-

West England market, and will include a rotation of five advertisements, featuring skiing, Canadian culture and heritage, big cities and the Canadian outdoors.

Travel trade activities, in conjunction with an active public/relations, media plan and conference and incentive travel plan are designed to generate and sustain awareness in Canada's travel product. We may not witness immediate successes, but as the UK economic situation improves and consumer confidence returns, more and more Britons will want to experience a Canadian holiday.

TOURISM DIVISION
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Tourism Personnel

Mr. Louis Poisson, Commercial Counsellor, Tourism
Responsible for the tourism program, advertising and media relations.

Anne Zobenbuhler, Press Attaché, Tourism
Responsible for the press relations program.

Danielle Cordisco, Trade Service Attaché, Tourism
Responsible for relations with the tourism industry and for market and product development.

Alyre Jomphe, Trade Service Attaché, Tourism
Responsible for fairs and promotion.

Agnes Raquet, Tourism Counsellor
Responsible for relations with the general public.

Thiery Journé, Tourism Counsellor

Raquel Driesch, Executive Assistant

Territory France

Population 57,200,000

Bilateral trade between France and Canada is valued at over 19 billion francs, or almost $4 billion. In 1990 there was a slight increase in the Canadian-French trade deficit, which is now $2.4 billion francs ($525 million). This deterioration is due to the slight drop in Canadian exports, while Canadian imports remained almost stable. However, this near stability hides a significant increase in the number of Airbus aircraft purchased, which compensated for the decline in other imports.

The principal Canadian products exported to France are, in order of importance, pulp and paper, power equipment, minerals, fish and seafood. French exports to Canada include aircraft, power and electrical equipment, alcoholic and non-alcoholic beverages and automobile parts.

Bilateral trade between France and Canada is quite small, considering the size of the two economies. Nonetheless, France is Canada's fourth largest buyer country, with 1.5% of Canadian exports, and its fifth largest supplier country, with 1.7% of Canadian imports. However, Canada ranks only twenty-fifth among France's supplier countries with 0.7% of French imports, and thirteenth among buyer countries, with 1% of French exports.

Characteristics of the Market

In 1991, nearly 317,000 French tourists visited Canada. This was an increase of more than twenty percent over the previous year, placing France fourth among our foreign markets, after the US, Britain and Japan.

The three tables below summarize the main characteristics of these markets.

PROVINCES VISITED

	1985	1986	1987	1988	1989	1990
Atlantic	3,900	5,800	9,200	7,000	8,000	8,300
Quebec	84,900	114,900	152,600	188,600	198,900	210,500
Ontario	44,900	57,900	82,400	108,700	110,900	118,100
Central	2,100	2,000	3,300	4,600	5,400	5,700
Alberta	4,000	4,000	9,600	12,000	13,100	13,800
British Columbia/ Yukon	7,000	10,700	13,300	18,500	17,500	18,200
Total	146,800	196,300	270,400	339,400	353,800	374,600

CHARACTERISTICS: Visits (24 hours +)

	1985	1986	1987	1988	1989	1990	1991
Number of visits	107,300	140,300	187,600	229,700	242,900	259,600	317,000
Increase		+ 31%	+ 33%	+ 22%	+ 6%	+ 6%	+ 22%
Expenditures in Canada (in millions $)	52.1	78.8	117.1	154.1	156.9	168.7	---
Average spent/visit	$486	$562	$624	$671	$646	$650	---
Average spent overnight stay	$38	$44	$50	$54	$54	$54	---
Average no. of nights	12.8	12.9	12.4	12.4	12.0	12.0	---

PURPOSE OF VISITS

	1985	1986	1987	1988	1989	1990
Business	20%	15%	15%	12%	12%	12%
Business/ Pleasure	18%	20%	18%	16%	15%	15%
Pleasure	30%	52%	38%	45%	44%	44%
Relatives/ Friends	30%	29%	26%	23%	25%	25%
Other	2%	4%	3%	4%	4%	4%
Total	100	100	100	100	100	100

Winter Activities

Growing French interest in winter travel to Canada was again confirmed in 1991-92. From January to March 1991, in the middle of the Gulf crisis, there were 28,000 French visitors to Canada, an increase of 17% over the preceding year. In 1980, 19% of French visitors to Canada came between November and April, while in 1990, 25% did so.

In 1985 there were no professionally organized tours to Canada, while in 1990-91 32 tour operators offered almost 100 packages, focussing on winter activities such as skiing, snowmobiling, dogsledding, ice fishing and winter carnivals.

The press is an essential channel for the development of "winter activities" product.

Future Plans: promotional projects centred on winter activities

This office will undertake the following:

- Continue to identify new tour operators and develop the existing programs;

- Organize familiarization visits for the press and tour operators;

- Inform and motivate a network of Canada retailers among selective travel agencies.

Other provincial representation in France

Quebec and Ontario

Foreign tourist offices in France

62 foreign countries have tourist representation in Paris.

Segmentation of the French market

In order to achieve a suitable combination of groups of travellers, the French tourist market has been divided into three segments, namely products, attitudes and goals.

Segmentation by products results in four groups of tourists with significant potential for Canada.

Travellers in the outdoor category (950,000 in number, or 16% of the market) are interested in outdoor activities such as walking and climbing, campgrounds and trailer parks, and wide-open spaces where they can escape the crowds.

They are careful with their money, and generally seek economical accommodation and inexpensive travel.

Travellers in the sports and entertainment segment (1.1 million in number, or 19%) enjoy sports like hunting and fishing, skiing, golf, tennis and water sports. They enjoy sports events, gambling casinos and night life, amusement parks and theme parks. The interests of those in this group may differ considerably because of their taste not only for sports but for amusements also. On one hand, this group is sometimes interested in campgrounds and trailer parks and in holiday resorts. On the other, it may show an interest in first-class hotels and large modern cities.

Those in the culture and nature segment (13%, or 750,000 in number) are interested in cultural attractions such as historic and archeological sites and buildings, old historic cities and towns, museums and art galleries, local handicrafts, local festivals and the like. They are also interested in native and immigrant cultural groups and others different from their own. These travellers also enjoy natural attractions such as wildlife and birds, national parks and forests, lakes and waterways, and virgin land.

Travellers in the culture and comfort category (1,062,000 in number, or 18%), gravitate to cultural features such as museums and art galleries, historic and archeological sites and buildings, the theatre, concerts and old historic cities and towns. They place premium on comfort and prefer first-class hotels, high standards of hygiene and cleanliness, large restaurants and personal safety. Travellers in this category are interested in various small guided excursions, preferably in smaller centres where everything can be taken in.

Guidelines for promotion

Our promotional program to the industry has three focal points.

To begin with, we feel that there must be a constant thrust to advertise Canadian tourism in France. The major initiative in this regard is Atelier Canada, in its sixth annual edition in 1992. This fair takes place in

Paris in early December and consists of a professional workshop bringing together more than 120 Canadian suppliers and some 500 French tour operators.

The second focal point consists of informing the French retailer network. Priority is placed on providing a greater awareness of Canadian destinations and of the range of products available on the French market. Door-to-door campaigns with travel agencies outside Paris have been undertaken as part of our joint marketing agreements. In this sector, a new initiative will result in our organizing a training school for travel agents. This will help lay the foundation for an informed, motivated network of retailers selling Canada.

The third field of priority activities consists of informing the clientele and the industry about the destination and the products available. Our program of press visits is especially important in France and aptly complements our advertising campaigns to the profession and to the general public. We also have an information service by fax for our main contacts (1000 tour operators receive a letter from Canada every month). Canadian suppliers may participate upon payment of a fee.

Press Program

Media: in the framework of our press relations activities, we plan to organize more than 30 press visits with the representatives of the publications most frequently read by the three main target segments identified by our study.

These visits will be organized "à la carte" in accordance with each journalist's interests and with the elements that we wish to promote.

They will take place in Ontario, Quebec, the Atlantic Provinces and also in the West, where we wish to put forth a concentrated effort because of a very definite demand in the French market. Thus in addition to Manitoba and the Yukon, which are in our VCP Media program, special attention will be given to Alberta and British Columbia this year.

A certain number of special promotional activities such as tourism shows, among others, will also give us contact with the press.

Thus Top Resa-Deauville, a fair designed exclusively for tourism professionals, and in which we take part yearly, will enable us to meet the members of the media, talk to them about Canada and announce the holding of Workshop Canada.

Canada-Paris Workshop: Every year we invite the tourist press, both professional and general public, to meet Canadian exhibitors. In 1990, we received 49 visitors who discovered the new products offered by Canadian professionals.

Among the tourism shows for the general public, where we also had an opportunity to meet the media, were the Salon Mondial du Tourisme et des Voyages in Paris, and the Salon Mahana in Lyons, where we met members of the regional press.

Finally, for three years the Association des Offices nationaux du tourisme and the Association professionnelle des Journalistes du Tourisme (AJPT) have organized a one-day workshop, which is attended by journalists from Paris and elsewhere in France.

This third edition was again a great success for Canada, because about 30 journalists stopped to discuss, make or confirm travel plans and request documentation.

New Product Potential

Quebec and Ontario are the main destinations programmed in France by tour operators. Many tourist regions in these two provinces are still under-exploited in France. These destinations can also be introduced as Incentive, Junior and Senior products. On the other hand, there has been a substantial increase in the supply of products on Alberta and British Columbia of late. This development closely follows the interest of French clientele in these new top-of-the-line destinations. With more accessible air transportation and the recent introduction of charters, the Canadian West should register a substantial increase in French visitors as early as the 1991 season. Suppliers in the Canadian West should already be positioning themselves on the French market.

Northern destinations and the "soft adventure" product have a very strong attraction in France. The French operators are especially interested in any new proposals that would distinguish them from the competition. Activities receiving little or no attention in France include culture, urban entertainments, winter and summer sports and wildlife observation.

Newfoundland and the Atlantic Provinces (Acadia) are also underexploited in France. This market has significant potential, but it will materialize only if developed in conjunction with better information on the product.

CANADIAN EMBASSY/TOURISM SECTION

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Phone: (81-3) 3479-5851

Fax: (81-3) 3470-7278 (G-3 System)

Tourism Personnel

Guy R. Simser, Counsellor (Commercial); Tourism Program Manager; also responsible for advertising, PR and liaison with Association of National Tourist Office Representatives in Japan (ANTOR-JAPAN).

Tomio (Tom) Suzuki, Commercial Officer - Tourism; Deputy Program Manager; responsible for office administration, research, market intelligence and strategic planning process.

Osamu (Sam) Yokoyama, Commercial Officer - Tourism; responsible for RVC, Kanata 91, trade promotion and product development, public relations.

Jun Saito, Commercial Officer - Tourism; responsible for JATA Congress and Trade Show, World Travel Fair, Tour Expo. Big Ski Canada, Winter Wonderland, trade promotion and product development.

Izumi Nukita, Secretary, also responsible for Tourism related accounting.

Junko Nakata, Secretary, Travel Information.

Sayuri Akiyama, Information Clerk, responsible for Mail House, publication and AV stock.

Mayumi Suda, Information Clerk, responsible for consumer inquiries.

Territory All of Japan

Population 122.61 million

This is expected to increase slowly to 130 million by the year 2010, after which there will be a gradual decline. Of the total population, approximately 61 percent is concentrated around the three major metropolitan areas of Tokyo (Kanto area - 39 million), Osaka (Kinki area - 20 million) and Nagoya (Tokai area - 14 million). One of the most significant changes occurring in the Japanese population is the rapidly growing proportion of senior citizens - from approximately 10 percent of the total population at present to 22 percent by 2020.

Assistance Available from Post

Market intelligence; sales leads/referrals; counselling to travel industry; assistance in co-ordinating planned joint advertising and promotions, seminars and other activities in the territory; making and co-ordinating appointments; escorting and private sector interpreting arrangements; media relations.

Japanese Travel Trade

Generally speaking, travel agents in Japan are classified into three groups: General Travel Agent (could be a wholesaler or a retailer or both), who may deal in both international and domestic travel agency business; Domestic Travel Agency, who may deal in only domestic travel; and Travel Sub-Agent, who may deal in travel services on behalf of a travel agent as its representative. Consequently, any one or all of the agencies in the GTA and TS-A categories could be our target contact. A very high percentage (over 94 per cent according to a recent JAL survey) of Japanese overseas pleasure travellers go thru a travel agency for holiday arrangements. There are approximately 1000 GTAs (head-office count only) and over 3500 Sub-Agencies. There are more than 100 wholesale package tour brands and of these about 30 produce tours to Canada on a regular basis.

Types of Tour Products

The majority of Japanese visitors to Canada travel in groups and have traditionally been and will undoubtedly continue to be of the general sightseeing variety. Outdoor activities currently enjoyed by Japanese visitors while in Canada are downhill skiing, salmon and fresh-water fishing and golfing. However, except for skiing, they will seldom form a group from Japan to exclusively play or enjoy these outdoor activities.

Rather, they will participate in them only as an optional addition to a tour and if they find the time to do so during their visit. Specific tour product development will have to be negotiated with wholesalers and tour producers according to current market demands and trends in conjunction with established areas in Canada and airline carrier partners such as Canadian Airlines International and Japan Airlines through the Vancouver and Toronto gateways. It is most unlikely that Japanese travel agent will pick-up a ready made package tour produced at the destination and sell it on a commission basis.

Market Segmentation

Generally speaking, there is no specific age group that is ahead of the other; likewise, there is no large gap in arrival figures between male and female visitors. Honeymoon traffic is gradually increasing and their preferred destinations in Canada are the West (Vancouver, Victoria and the Rockies) and the so called Maple Kaido (Niagara Falls, Toronto, Montreal and Quebec). Young Ladies and "Anne Fans" have discovered Atlantic Canada, especially, Prince Edward Island. The "Silver Age" or retired couples in early sixties is a fast growing segment; this group has a propensity to turn into "repeaters". Students in senior high-schools and colleges are now moving in groups as the institutions they belong to have begun to establish individual relations with their counter parts in Canada. Although still very small family travel is gradually coming into the scene. A number of Japanese families were spotted on the West Coast during the summer as well as during the winter holiday seasons.

Canada's share of the overseas ski market remains to be very high at about 75 percent to 80 percent. The most popular destination is the Whistler/Blackcomb (over 70 percent) with Banff getting approximately 25 percent of the arrivals. A number of Japanese ski wholesalers have introduced Quebec ski areas in their brochures last (1990/91) season to be satisfied with the reactions of consumers and have decided to continue to offer Quebec ski tours in their 1991/92 season.

Priority Segments and Marketing Strategy

A partner coordinated strategy aimed at off season travel (fall, winter and spring) when capacity and cost problems are reduced: aimed at young female, silver age and skiers. FIT and family travel will be watched closely as a new growth segment potential.

Key Partners Associated with Post Activities

Provinces of Alberta, British Columbia, Ontario, Prince Edward Island, Quebec and a number of Visitor Bureaus; Air Canada, Canadian Airlines International as well as a number of Japanese travel trade companies.

Foreign Government Tourism Offices in Japan

Over 60 national, provincial, state, city tourism representatives are located in Japan, mostly in Tokyo but a number of them have branch offices in Osaka.

Canadian Consulate General - Atlanta

Event	Date	Location	Target Market	Contact Person	
PAL Travel Productions	Feb. 4	Jacksonville	Travel Trade	W. Pando	305-443-3007
PAL Travel Productions	Feb. 5	Savannah	Travel Trade	W. Pando	305-443-3007
PAL Travel Productions	Feb. 6	Augusta	Travel Trade	W. Pando	305-443-3007
PAL Travel Productions	Apr. 7	Chattanooga	Travel Trade	W. Pando	305-443-3007
PAL Travel Productions	Apr. 8	Nashville	Travel Trade	W. Pando	305-443-3007
PAL Travel Productions	Apr. 9	Knoxville	Travel Trade	W. Pando	305-443-3007
PAL Travel Productions	Apr. 21	Tampa	Travel Trade	W. Pando	305-443-3007
PAL Travel Productions	Apr. 22/93	Fort Myers	Travel Trade	W. Pando	305-443-3007
PAL Travel Productions	Feb. 23	W. Palm Beach	Travel Trade	W. Pando	305-443-3007
Southern Spring Show	Feb. 22/Mar.1	Charlotte	Cons./Travel Trade	L. Dillard	704-376-6594
Vacation, 1992	Feb. 21/22	Rome,GA	Travel Trade	M. Bryant	404-291-7041
The Travel Marketplace	Feb. 24	Atlanta	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Feb. 25	Orlando	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Feb. 26	Tampa	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Feb. 27	Ft. Lauderdale	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Feb. 28	Miami	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Oct. 5	Atlanta	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Oct. 6	Charlotte	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Oct. 8	Nashville	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Oct. 9	Memphis	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Nov. 2	Orlando	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Nov. 4	Tampa	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Nov. 5	Ft. Lauderdale	Travel Trade	S. Oliver	800-635-7469
The Travel Marketplace	Nov. 6	Miami	Travel Trade	S. Oliver	800-635-7469
Trade/Dinner Show	Feb. 24	Miami	Travel Trade	--------	516-868-4178
Trade/Dinner Show	Feb. 25	Boca Raton	Travel Trade	--------	516-868-4178
Trade/Dinner Show	Feb. 26	W. Palm Beach	Travel Trade	--------	516-868-4178
Trade/Dinner Show	Feb. 27	Orlando	Travel Trade	--------	516-868-4178
Trade/Dinner Show	May 13	charlotte	Travel Trade	--------	516-868-4178
Trade/Dinner Show	May 14	Atlanta	Travel Trade	--------	516-868-4178
Trade/Dinner Show	Nov. 30	Miami	Travel Trade	--------	516-868-4178
Trade/Dinner Show	Dec. 1	Boca Raton	Travel Trade	--------	516-868-4178
Trade/Dinner Show	Dec. 2	W. Palm Beach	Travel Trade	--------	516-868-4178
Trade/Dinner Show	Dec. 3	Orlando	Travel Trade	--------	516-868-4178
D. Holland Trade Shows	Mar. 2	Atlanta	Travel Agents	--------	612-938-8526
D. Holland Trade Shows	Mar. 3	Charlotte	Travel Agents	--------	612-938-8526
D. Holland Trade Shows	Mar. 4	Raleigh	Travel Agents	--------	612-938-8526
D. Holland Trade Shows	Mar. 16	New Port Richie	Travel Agents	--------	612-938-8526
D. Holland Trade Shows	Mar. 17	Tampa	Travel Agents	--------	612-938-8526
D. Holland Trade Shows	Mar. 18	Orlando	Travel Agents	--------	612-938-8526
D. Holland Trade Shows	Mar. 23	W. Palm Beach	Travel Agents	--------	612-938-8526
D. Holland Trade Shows	Mar. 24	Miami	Travel Agents	--------	612-938-8526
D. Holland Trade Shows	Mar. 25	Ft. Lauderdale	Travel Agents	--------	612-938-8526
D. Holland Trade Shows	Mar. 26	Ft. Myers	Travel Agents	--------	612-938-8526
SATO Travel Fair	Mar. 12	Ft. Benning	Military	L. Guerrero	404-682-0361
AAA West. N. Carolina	Apr. 5	Asheville	Cons./Travel Trade	L. McKinney	704-253-5376
TIAC Convention	Aug. 20/23	Tampa	TravelTrade	T. Botto	813-973-1111

Canadian Consulate General - Boston

Event	Date	Location	Target Market	Contact Person	
Vacation World	Jan. 10-12	Boston	Consumer	J. Dawson	617-861-9808
New England Camping & RV Show	Jan. 25-Feb. 2	Boston	Consumer	P. O'Donnell	617-242-6092
Winter Regional Ski Show	Jan. 27-29	Mt. Snow	Consumer	--------	802-464-3333
Outdoor Writes Assoc. Conf.	Feb. 4-9	Worcester	Media	R. Johansen	617-262-3760
Fishing & Outdoor Expo	Feb. 5-9	Worcester	Consumer	P. Fuller	603-431-4315
Golf & Tennis Expo	Feb. 14-17	Boston	Consumer	L. Stanley	508-777-2311
10th Ann. Fishing & Oudoor Show	Feb. 15-17	Manchester	Consumer	S. Flanders	603-424-4946
21st Ann. Main Camper & RV Show	Feb. 15-17	Portland	Consumer	---------	207-775-1196
Fishing & Sportsman Show	Feb. 20-23	W. Springfield	Consumer	F. Sousa	413-594-2085
Fishing & Hunting Sportsmen Show	Feb. 28-Mar. 3	Boston	Consumer	F. Sousa	413-594-2085
Travel Marketplace	Mar. 2	Boston	Travel Trade	K. Lorden	800-666-3976
Augusta Camping & Outdoor Show	Mar. 13-15	Augusta	Consumer	---------	207-865-1196
Henry Davis Trade Show	Mar. 23	Providence	Travel Trade	T. Keefe	508-851-4749
Henry Davis Trade Show	Mar. 24	Boston	Travel Trade	T. Keefe	508-851-4749
Ontario Marketplace	Mar. 24	Providence	Travel Trade	B. Adduci	617-266-7172
Ontario Marketplace	Mar. 26	Boston	Travel Trade	B. Adduci	617-266-7172
The Travel Marketplace	Mar. 27	Providence	Travel Trade	K. Lorden	800-666-3976
Maine Sportsman Show	Mar. 27-29	Augusta	Consumer	H. Vanderweide	207-626-2405
Continental Express Show	April	Bangor	Travel Trade	L. A. Marks	201-961-0032
Meeting Industry Conferences	TBA	Boston	Meeting/Conventions	G. Adams	508-689-2627
Ski Group'92	May. 4	Waltham	Travel Trade	J. Simon	212-570-1950
Delta Air Lines Picnic & Ski	Sept.	Boston	Travel Trade	R. Rich	702-785-2614
The Travel Marketplace	Sept. 30	Boston	Travel Trade	K. Lorden	800-666-3976
The Travel Marketplace	Oct. 2	Providence	Travel Trade	K. Lorden	800-666-3976
Henry Davis Trade Show	Oct. 21	Providence	Travel Trade	T. Keefe	508-851-4749
Henry Davis Trade Show	Oct. 22	Boston	Travel Trade	T. Keefe	508-851-4749
Colpitts Travel Show	Oct.	Dedham	Consumer	J. Johnston	617-326-7800
Continental Fall Trade Show	Oct.	Portland	Travel Trade	L. A. Marks	201-961-0032
Golf Group	Oct.	Boston	Group Influence	E. Haas	702-456-1119
Vermont Soc. of Travel Agents	Nov.	Burlington	Travel Trade	M. E. Clark	802-885-2191
Quebec Ski Night	Nov.	Boston	Travel Trade	G. Biron	617-723-3366
Boston Ski Show	Nov.	Boston	Consumer	B. Weichel	212-242-6582

Canadian Consulate General - Buffalo

Event	Date	Location	Target Market	Contact Person	
Group Leader Mark.	Jan. 7	Rochester	Group Leaders	Empire Trail.	716-232-4116
Great Lakes RV, Travel Expo	Jan. 10-12	Buffalo	Consumer	T. Rust	716-965-5311
Great Northeastern Sport Show	Jan. 22-26	Syracuse	Consumer	R. Hodge	315-824-1820
Northeast Auto Travel Show	Feb. 1-2	Buffalo	Consumer	AAA of WNY	716-634-7900
* Canada Showcase	Feb. 11	Buffalo	Mtg/Conv/Cons.	L. Neiderlander	716-852-1247
Syracuse Auto Travel Show	Feb. 29	Syracuse	Consumer	AAA of Syr.	315-475-8140
Buffalo Sport & Travel Show	Mar. 12-15	Buffalo	Consumer	S. Concilla	814-725-3856
Syracuse Sportsmen's Show	Mar. 12-15	Syracuse	Mtg/Conv/Cons.	B. Borshers	413-594-2085
NYSBTA Product Fair	Mar. 12	Rochester	Travel Trade Media	C. Sutherland	716-846-3450
* Canada Marketplace	Mar. 16	Syracuse	Travel Trade Media	L. Neiderlander	716-852-1247
* Canada Marketplace	Mar. 17	Rochester	Travel Trade Media	L. Niederlander	716-852-1247
* Canada Marketplace	Mar. 18	Buffalo	Travel Trade Media	L. Niederlander	716-852-1247
G. L. Fishing & Outdoor Expo.	Mar. 25-29	Buffalo	Consumer	P. Fuller	603-431-4315
Champlain Valley Sports, Adv.	Apr. 5-7	Plattsburgh	Consumer	Nova Expo Group	518-891-5952
Womern-In-Travel Night	June 16	Buffalo	Travel Trade	L. Niederlander	716-852-1247
GLAMER Travel Show	Sept. 9	Buffalo	Group Leaders	R. Conrad	800-628-0993
GLAMER Travel Show	Sept. 11	Syracuse	Group Leaders	R. Conrad	800-628-0993
* Canada Marketplace	Sept. 28	Syracuse	Travel Trade Media	L. Niederlander	716-852-1247
* Canada Marketplace	Sept. 29	Rochester	Travel Trade Media	L. Niederlander	716-852-1247
* Canada Marketplace	Sept. 30	Buffalo	Travel Trade Media	L. Niederlander	716-852-1247
Chenango Leaders Marketplace	Oct.	Binghamton	Group Leaders	M. Solomon	607-723-9408
Blue Bird Gr. Marketplace	Nov.	Buffalo	Group Leaders	M. Burridge	716-852-4900
Niagara Scenic Gr. Marketplace	Nov.	Buffalo	Group Leaders	T. Baker	716-648-3603
Seaway Destinations Gr.	Nov.	Buffalo	Group Leaders	S. Rzepecki	716-892-0482

* Indicates participation by the Canadian Consulate - Buffalo (716-852-1247)

Canadian Consulate General - Chicago

Event	Date	Location	Target Market	Contact Person	
All Canada Show	Jan.9-12	St. Louis	Consumer	P. Hopkins	414-866-2323
Intl. Advendure Travel	Jan.10-12	Chicago	Consumer	C. Rogers	708-888-8335
All Cda Show-CHCGO I	Jan.16-19	Chicago	Consumer	P. Hopkins	414-866-2323
All Cda Show-CHCGO II	Jan.20-22	Merrillville	Consumer	P. Hopkins	414-866-2323
All Cda Show-Milwaukee	Jan.23-26	Milwaukee	Consumer	P. Hopkins	414-866-2323
Chicagoland Sport	Jan24-Feb3	Chicago	Consumer	T. Portincaso	708-299-3131
All Cda Show-Madison	Jan.27-29	Madison	Consumer	P. Hopkins	414-866-2323
CHCGO Women in Travel	Jan.28	Chicago	Travel Trade	C. Roman	
All Cda Show-Kansas Ct	Jan31-Feb2	Kansas City	Consumer	P. Hopkins	414-866-2323
CSAE Winter Educational	Feb.18	Chicago	Association	----------	312-236-2288
All Cda Show-Green Bay	Feb.20-23	Green Bay	Consumer	P. Hopkins	414-866-2323
CHCGO Golf Show	Feb.21-23	Chicago	Consumer	S. Sidari	708-773-6575
CHCGO Tribune Show	Feb.26	Chicago	Travel Trade	D. Holland	612-938-8526
Milwaukee Journal Show	Feb.27	Milwaukee	Travel Trade	D. Holland	612-938-8526
WFRV-TV Travel Show	Feb29-Mar1	Green Bay	Consumer	R. Peal	414-494-9507
Travel & Recreational	March 92	Normal	Consumer	D. Johnston	309-655-0035
Milwaukee Sentinel	March 92	Milwaukee	Consumer	M. Sabljak	414-224-2419
CHCGO Area Mtg Planners	Mar.6	Chicago	Association	----------	312-661-1700
CANOECOPIA '92	Mar.13-15	Madison	Consumer	G. Sussman	608-256-4303
Kansas City Star Times	Mar.18	Kansas City	Travel Trade	D. Holland	612-938-7239
St. Louis Post	Mar.19	St. Louis	Travel Trade	R. Farroll	314-622-7325
Deer Show	Mar.27-29	Springfield	Consumer	A. Miller	414-242-3990
Wisconsin Women	Mar.31	Madison	Travel Trade	S. Barclay	608-277-7447
Deer Show	Apr.3-5	Madison	Consumer	A. Miller	414-242-3990
Henry Davis-CHCGO I	Apr.29	Chicago	Travel Trade	J. Diberardino	800-237-7452
Henry Davis-CHCGO II	Apr.30	Chicago	Travel Trade	J. Diberardino	800-237-7452
CMSC Seminar	May 92	Chicago	Ski Trip Pl.	J.J. Jurgeto	312-346-1268
SKIGROUP'92	May14	Chicago	Travel Trade	----------	702-456-1119
CSAE Annual Mtg	May21	Chicago	Association	----------	312-236-3771
Delta Airlines Ski	Sept 92	Chicago	Travel Trade	----------	
American Airlines	Sept 92	Chicago	Consumer	----------	817-967-3158
Milwaukee Journal	Sept24	Milwaukee	Travel Trade	D. Holland	612-938-8526
Travel Marketplace	Sept29	Kansas City	Travel Trade	S. Oliver	800-635-7469
Travel Marketplace	Sept30	St. Louis	Travel Trade	S. Oliver	800-635-7469
Chicago Tribune	Sept30	Chicago	Travel Trade	D. Holland	6120938-8526
St. Louis Post	Oct 92	St. Louis	Travel Trade	R. Farroll	314-622-7325
Ski The West	Oct 92	Chicago	Travel Trade	----------	818-999-4070
Travel Marketplace	Oct12	Rosemont	Travel Trade	S. Oliver	800-635-7469
Travel Marketplace	Oct13	Chicago	Travel Trade	S. Oliver	800-635-7469
I.T. & M.E. 1992	Oct13-15	Chicago	Incentive	----------	708-850-7779
Travel Marketplace	Oct14	Chicago	Travel Trade	S. Oliver	800-635-7469
Travel Marketplace	Oct15	Milwaukee	Travel Trade	S. Oliver	800-635-7469
Kansas City Star/Times	Oct19	Kansas City	Travel Trade	----------	612-938-8526
GOLFGROUP'92	Oct26	Chicago	TravelInfluen	----------	702-456-1119
Chicago Ski Show	Oct29-Nov01	Chicago	Consumer	A. Adezio	312-622-4905
Central Illinois	Nov 92	Peoria	Travel Trade	L. Morgan	
Henry Davis-CHCGO I	Nov16	Rosemont	Travel Trade	J. Diberardino	800-237-7452
Henry Davis-CHCGO II	Nov17	Chicago	Travel Trade	J. Diberardino	800-237-7452
CSAE Holiday Showcase	Dec04	Chicago	Association	---------	312-236-2288

Canadian Consulate - Cleveland

Event	Date	Location	Target Market	Contact Person	
Fishing/Hunting/Vacation	Jan. 4	Cleveland	Consumer	J. Prunty	800-325-6290
Great Lakes RV Show	Jan. 8-12	Cleveland	Consumer	--------	216-529-1300
Camper & RV Show	Jan. 15-19	Dayton	Consumer	--------	513-278-4776
Mid-America Boat Show	Jan. 17-26	Cleveland	Cons/Trade	N. Schultz	216-621-3618
Sports & Boat Show	Jan. 11-19	Cincinnati	Consumer	T. Fales	513-825-1600
Akron RV Show	Jan. 29/Feb.2	Akron	Consumer	J. Duncan	216-773-7474
Miami Valley Boat Show	Jan. 29/Feb.2	Dayton	Consumer	--------	513-278-4776
Camp & Travel RV Show	Feb. 7-9		Consumer	M. Lieber	419-841-2000
Vacation & Travel Show	Feb. 8-16	Columbus	Consumer	T. Shutt	614-461-5257
Woods & Waters	Feb. 18	Cleveland	Consumer	---------	
Akron Sportsman Show	Feb. 19-23	Akron	Consumer	D. Bayley	216-297-6126
Henry Davis Show	Mar. 2	Pittsburgh	Travel Trade	---------	800-237-7452
Henry Davis Show	Mar. 3	Columbus	Travel Trade	---------	800-237-7452
Henry Davis Show	Mar. 4	Cincinnati	Travel Trade	---------	800-237-7452
The Travel Marketplace	Mar. 5	Pittsburgh	Travel Trade	---------	818-999-4070
The Travel Marketplace	Apr. 22	Cleveland	Travel Trade	---------	818-999-4070
The Travel Marketplace	Apr. 23	Cincinnati	Travel Trade	---------	818-999-4070
The Travel Marketplace	Sept. 21	Pittsburgh	Travel Trade	---------	818-999-4070
The Travel Marketplace	Oct. 26	Cleveland	Travel Trade	---------	818-999-4070
The Travel Marketplace	Oct. 27	Columbus	Travel Trade	---------	818-999-4070
The Travel Marketplace	Oct. 28	Dayton	Travel Trade	---------	818-999-4070
The Travel Marketplace	Oct. 29	Cincinnati	Travel Trade	---------	818-999-4070
D. Holland Trade Show	Mar. 10	Cincinnati	Travel Trade	---------	612-938-8526
Sports, Boat & Camper	Mar. 18-22	Dayton	Consumer	---------	513-278-4776
US & Cnd Sport/Travel Outdoor	Mar. 20-29	Cleveland	Consumer	C. Fassnacht	216-529-1300
Small Business Marketplace	Mar. 25-26	Pittsburgh	Trade	--------	800-666-3976
Small Business Marketplace	Sept. 23-24	Cleveland	Trade	B. Muldoon	216-344-4238
Cleveland Plain Dealer	Apr. 2	Cleveland	Travel Trade	R. Gasparello	617-740-1185
Senior Travel Days	May 1	Cleveland	Group Leaders	R. Gasparello	617-740-1185
Ski Group'92	May 6	Cleveland	Group Leaders	--------	212-570-1950

Cincinnati Territory Events 1992

Event	Date	Location	Target Market	Contact Person	
Sport,Travel & Boat	Jan. 11-19	Cincinnati	Consumer	C. Hart	513-825-1600
Quebec Day	t.b.a.	Louisville	Trade-MC&IT	S. Horwitz	312-427-0240
Columbus Boat & RV	Jan. 8-12	Columbus	Consumer	T. Luckhaupt	614-467-2843
Sport,Boat & Vacation	Jan25-Feb2	Louisville	Consumer	H. King	502-454-0788
Miami Valley Camper	Jan. 15-19	Dayton	Consumer	M. Schopoler	513-278-4776
Miami Valley Boat	Jan29-Feb2	Dayton	Consumer	M. Schopoler	513-278-4776
Sports & Vacation	Feb. 8-16	Columbus	Consumer	T. Shutt	614-461-5257
RV & Boat	Feb. 20-23	Lexington	Consumer	B. Davies	606-299-0411
P.A.L. Travel Show	Mar. 4-18	Cincinnati	Trade-Retail	W. Pando	305-443-3007
Henry Davis Trade Shows	Mar. 3-4	Cincinnati	Trade-Retail	H. Davis	800-237-7452
AAA Seminars (Yukon)	Mar. 11-12	Cincinnati	Trade-AutoClub	Post	
Don Holland Trade Shows	Mar. 10-11	Cincinnati	Trade-Retail	D. Holland	612-938-8526
Miami Valley Sport Show	Mar. 18-22	Dayton	Consumer	M. Schopler	513-278-4776
Group Ldrs of America	Mar. 27	Cincinnati	Trade-Seniors	R. Conrad	800-628-0993
Travelmarketplace	Apr. 23	Cincinnati	Trade-Retail	M. Mohr	800-635-7469
Outdoor Writers of Ohio	May 1-3	Marietta	Trade-Media	Post	
Ohio Valley Business	May 6	Cincinnati	Trade-MC&IT	Post	
Skigroup	May 13	Cincinnati	Trade-SkiClubs	J. Simone	702-456-1119
Ohio Valley Ski Council	t.b.a.	?	Trade-SkiClub	Post	
Ohio Society of Assn.	t.b.a.	?	Trade-MC&IT	Post	
Ohio Soc.of Assn.Execs.	t.b.a.	?	Trade-MC&IT	Post	

Cincinnati Territory Events 1992

Event	Date	Location	Target Market	Contact Person	
Sport,Travel & Boat	Jan. 11-19	Cincinnati	Consumer	C. Hart	513-825-1600
Quebec Day	t.b.a.	Louisville	Trade-MC&IT	S. Horwitz	312-427-0240
Columbus Boat & RV	Jan. 8-12	Columbus	Consumer	T. Luckhaupt	614-467-2843
Sport,Boat & Vacation	Jan25-Feb2	Louisville	Consumer	H. King	502-454-0788
Miami Valley Camper	Jan. 15-19	Dayton	Consumer	M. Schopoler	513-278-4776
Miami Valley Boat	Jan29-Feb2	Dayton	Consumer	M. Schopoler	513-278-4776
Sports & Vacation	Feb. 8-16	Columbus	Consumer	T. Shutt	614-461-5257
RV & Boat	Feb. 20-23	Lexington	Consumer	B. Davies	606-299-0411
P.A.L. Travel Show	Mar. 4-18	Cincinnati	Trade-Retail	W. Pando	305-443-3007
Henry Davis Trade Shows	Mar. 3-4	Cincinnati	Trade-Retail	H. Davis	800-237-7452
AAA Seminars (Yukon)	Mar. 11-12	Cincinnati	Trade-AutoClub	Post	
Don Holland Trade Shows	Mar. 10-11	Cincinnati	Trade-Retail	D. Holland	612-938-8526
Miami Valley Sport Show	Mar. 18-22	Dayton	Consumer	M. Schopler	513-278-4776
Group Ldrs of America	Mar. 27	Cincinnati	Trade-Seniors	R. Conrad	800-628-0993
Travelmarketplace	Apr. 23	Cincinnati	Trade-Retail	M. Mohr	800-635-7469
Outdoor Writers of Ohio	May 1-3	Marietta	Trade-Media	Post	
Ohio Valley Business	May 6	Cincinnati	Trade-MC&IT	Post	
Skigroup	May 13	Cincinnati	Trade-SkiClubs	J. Simone	702-456-1119
Ohio Valley Ski Council	t.b.a.	?	Trade-SkiClub	Post	
Ohio Society of Assn.	t.b.a.	?	Trade-MC&IT	Post	
Ohio Soc.of Assn.Execs.	t.b.a.	?	Trade-MC&IT	Post	

Pittsburgh Territory Events 1992

Event	Date	Location	Target Market	Contact Person
Travel Marketplace	October	Pittsburgh	Trade	
Golf Group	November	Pittsburgh	Corp/Incentive	
TravelSports&BoatShow	January	Pittsburgh	Consumer	
Outdoor Sports Show	February	Pittsburgh	Consumer	
Destination Canada	Apr. 2	Pittsburgh	All Cda etc	
Showcase Canada	Apr. 28	Pittsburgh	All Cda etc	
Fall for Canada	September	Pittsburgh	All Cda etc	

Canadian Consulate General - Dallas

Event	Date	Location	Target Market	Contact Person	
S. W. Boat Show	Jan. 1-5	Dallas	Consumer	Worldwide Prod.	214-265-7469
Golf-Tennis & Tvl	Pending	OK City	Consumer	--------	---------
N. LA. Travel	Pending	Shreveprt	Consumer	M. Hutto	318-377-4420
McAllen Travel Show	Jan. 7-8	McAllen	Consumer	K. Dailey	512-682-2871
Shot Show	Jan. 9-12	Dallas	Consumer	T. Fagan	617-536-8152
Sport-Boat & Tvl	Jan. 14-19	San Antonio	Consumer	G. Coffin	409-295-9677
* Dan Dipert Show	Jan. 18-19	Arlington	Travel Trade	D. Ward	817-543-3720
Boat Show	Jan24-26/31/2	OK City	Consumer	H. Wiersig	405-685-3600
Adventure 92 Expo	Jan. 25-26	Amarillo	Consumer	Amarillo CVB	800-692-1338
* RCMA Conference	Jan. 28-31	Phoenix	MC&IT	D. Woodwing	317-632-1888
Sport-Boat-Travel	Jan. 28/Feb.2	Tulsa	Consumer	R. Krisman	918-486-3318
* Int'l Tours Inc.	Jan. 29/Feb.2	Dallas	Travel Trade	R. Carr	918-743-8687
Hunt & Fish Show	Jan. 30-Feb.2	Houston	Consumer	R. Miller	713-589-7991
World Travel Expo	Jan. 30-Feb.2	San Antonio	Consumer	M. Sauder	512-829-1555
Hunt & Fish Show	Feb. 7-9	Austin	Consumer	R. Miller	713-589-7991
Sport, Boat & Travel	Feb. 12-16	Wichita	Consumer	---------	303-422-3888
OK Tackle Show	Feb. 13-16	OK City	Consumer	H. Wiersig	405-685-3600
* Experience Canada	Feb. 17	San Antonio	Travel Trade	S. Ellis	214-922-9806
* Experience Canada	Feb. 18	Austin	Travel Trade	S. Ellis	214-922-9806
* Experience Canada	Feb. 19	Houston	Travel Trade	S. Ellis	214-922-9806
* Experience Canada	Feb. 20	Dallas	Travel Trade	S. Ellis	214-922-9806
Dallas TX Golf Show	Feb. 21-23	Dallas	Consumer	J&D Expo	800-772-8431
RV, Van & Outdoor	Feb.27-Mar.1	OK City	Consumer	G. Motley	405-495-3400
SW Sports & Vac	Late Feb.	Dallas	Consumer	--------	214-265-7469
AA Flyaway Supermkt	Mar. 6-8	Dallas	Consumer	E. Sachs	817-967-3153
Vacation Supermarket	Mar. 6-8	Dallas	Consumer	M. Wells	817-967-3153
TravelMarket Place	Mar. 9	Houston	Travel Trade	Renee	800-666-3976
TravelMarket Place	Mar. 10	Austin	Travel Trade	Renee	800-666-3976
TravelMarket Place	Mar. 11	San Antonio	Travel Trade	Renee	800-666-3976
TravelMarket Place	Mar. 12	Dallas	Travel Trade	Renee	800-666-3976
TravelMarket Place	Mar. 13	Ft. Worth	Travel Trade	Renee	800-666-3976
Sportsmans Show	Mar. 11-15	New Orleans	Consumer	Joanie	504-466-0921
World of Cruises	Mar. 15	Dallas	Consumer	B. Seals	800-772-8431
Golf & Resort Show	Mar. 20-22	Houston	Consumer	B. Seals	818-882-6877
Henry Davis Show	Mar. 23	San Antonio	Travel Trade	Virginia	516-868-4178
Henry Davis Show	Mar. 24	Houston	Travel Trade	Virginia	516-868-4178
Henry Davis Show	Mar. 25	Dallas	Travel Trade	Virginia	516-868-4178
Henry Davis Show	Mar. 26	Ft. Worth	Travel Trade	Virginia	516-868-4178
Sports, Camper & Vac	Pending	Houston	Consumer	G. Coffen	713-242-7469
Fish & Tackle	Pending	Ft. Worth	Consumer	J. Poole	817-551-1219
Ski Group	Pending	New Orleans	Consumer	J. Simon	702-456-1119
Hunt & Fish Show	April	Beaumont	Consumer	R. Miller	713-589-7991
Gun Collector Assocows	Apr. 4-5	Tulsa	consumer	Joe	918-745-9140
Grand Destinations	Pending	Houston	Travel Trade	J&D Expo	818-999-4070
Grand Destinations	Pending	New Orleans	Travel Trade	J&D Expo	818-999-4070
Grand Destinations	Pending	San Antonio	Travel Trade	J&D Expo	818-999-4070
* Showcase Canada	May 6	Houston	MC&IT	J. Bradley	214-922-9806
* Showcase Canada	May 7	Dallas	MC&IT	J. Bradley	214-922-9806
Ski Group	May 18	Houston	Travel Trade	J. Simon/Mary	702-456-1119
Ski Group	May 19	Austin	Travel Trade	J. Simon/Mary	702-456-1119
Ski Group	May 20	Dallas	Travel Trade	J. Simon/Mary	702-456-1119
* TSAE	June 11-14	Ft. Worth	MC&IT	J. Bradley	214-922-9806
AARP Bi-Annual	June 24	San Antonio	Consumer	N. Cohen	202-728-4390
Hunt & Fish Show	Pending	Austin	Consumer	---------	713-589-7991

* Indicates participation by the Canadian Consulate General - Dallas (214) 922-9806

Canadian Consulate General - Detroit

Event	Date	Location	Target Market	Contact Person	
Boat, Sport, Fishing Show	Jan. 25	Pontiac	Consumer	H. Boucher	616-530-1919
Detroit Boat & Fish.	Feb. 1-9	Detroit	Consumer	M. Carl	313-344-1330
* NEBS Tourism Mission	Feb. 11-13	Ypsilanti	Travel Trade	M. Rice	313-567-2340
Indy Boat, Sport & Tvl	Feb.21/Mar.1	Indianapolis	Consumer	M. Renfor	317-546-4344
Michigan Outdoorama	Feb.21/Mar.1	Detroit	Consumer	R. Kalis	517-371-1041
* SWOTA ED. Seminars TBA	Feb. TBA	Detroit	----------	M. Rice	313-567-2340
* Tour Operator Educ.	Mar. 11-12	L/Southfield	Travel Planners	M. Rice	313-567-2340
Don Holland Tvl Show TBA	Mar. 30	Ann Arbor	Travel Trade	D. Holland	612-983-8526
Detroit News Travel Show	Mar. 31	Dearborn	Travel Trade	J. West	313-222-2326
Metro Detroit Ski Show	May 3	Troy	Consumer	J. Palazzolo	313-322-0424
Glamer Travel Show TBA	May 6	Detroit	Travel Trade	R. Conrad	216-337-1027
Imperial Travel Expo	May 13-14	Lafayette	Travel Trade	Imperial Tvl	317-447-7666
Mi. Credit Union Conf. TBA	May 28-30	Detroit	Travel Trade	J. Avery	313-352-1250
MPI National Conference	June 26-30	Detroit	Travel Trade	C. Alwood	517-349-0085
MSAE Summer Conference TBA	July 15-17	Mackinaw Island	----------	C. Ronk	517-485-9474
ISAE Summer Conference TBA	July 16-18	Columbus	----------	L. Shaw	317-638-4402
Ambassadair Travel Expo	Aug. 11-12	Indianapolis	Travel Trade	M. Chadwick	317-247-4000
Don Holland Travel Show	Oct. 5	Grand Rapids	Travel Trade	D. Holland	612-983-8526
Detroit News Travel Show	Oct. 6	Dearborn	Travel Trade	J. West	313-222-2326
* All Canada Ski show	Oct. 7	Southfield	Ski Club	M. Rice	313-567-2340

* Indicates participation by the Canadian Consulate General - Detroit (313) 567-2340

Canadian Consulate General - Los Angeles

Event	Date	Location	Target Market	Contact Person	
Sports, Vacation & RV Show	Jan. 4-12	Anaheim	Consumer	M. Howard	818-841-9850
13th Annual Pacific Showcase	Jan. 7	Santa Barbara	Travel Trade	K. Billep	213-453-6595
13th Annual Pacific Showcase	Jan. 8	Bakersfield	Travel Trade	K. Billep	213-453-6595
13th Annual Pacific Showcase	Jan. 9	Los Angeles	Travel Trade	K. Billep	213-453-6595
13th Annual Pacific Showcase	Jan. 14	San Diego	Travel Trade	K. Billep	213-453-6595
13th Annual Pacific Showcase	Jan. 15	Orange County	Travel Trade	K. Billep	213-453-6595
13th Annual Pacific Showcase	Jan. 16	Ontario	Travel Trade	K. Billep	213-453-6595
13th Annual Pacific Showcase	Jan. 23	Phoenix	Travel Trade	K. Billep	213-453-6595
Fishing, Tackle, Boat & Travel	Jan. 22-26	Palm Springs	Consumer	Fred Hall	818-784-3036
Metro Phoenix World Tvl Show	Jan. 25-26	Phoenix	Cons./Travel Trade	M. Smith	602-948-4442
* Canada Spr/Sum/Fall	Jan. 27	San Diego	Travel Trade	J. Clark	213-687-7041
* Canada Spr/Sum/Fall	Jan. 28	Orange County	Travel Trade	J. Clark	213-687-7041
* Canada Spr/Sum/Fall	Jan. 29	Los Angeles	Travel Trade	J. Clark	213-687-7041
* Canada Spr/Sum/Fall	Jan. 30	San Frndo.	Travel Trade	J. Clark	213-687-7041
ASTA's San Diego Travel	Jan. 29	San Diego	Travel Trade	M. Smith	602-948-4442
Southern California Boat	Jan. 31/Feb.9	Los Angeles	Consumer	T. Tjaken	714-633-7581
Orange City. Register Tvl	Feb. 1-2	Orange County	Trvl/Trade/Cons.	J. Grochow	714-953-4856
40th Phoenix Sports Show	Feb. 6-9	Phoenix	Consumer	E. Greenband	602-277-4748
Time or Your Life Expo	Feb. 7-9	Anaheim	Trvl/Trade/Cons.	D. Stone	213-216-7993
Auto Club Travel Show	Feb. 8	San Diego	Consumer	D. Price	213-741-3027
Kashi bicycling & Oudoor	Feb. 8-9	San Diego	Consumer	D. Gindling	619-270-3478
Int'l Travel Industry Expo	Feb. 17-19	Las Vegas	Travel Trade	D. Lindeman	617-449-6600
Convention/Expo Summitt	Feb. 18-21	Las Vegas	Meetings/Conv.	P. Shack	702-739-0875
The Travel Show	Feb. 22-23	Los Angeles	Trvl/Trade/Cons.	D. Freimann	714-639-3700
Fishing Tackle, Boat, Travel	Feb. 26/Mar. 1	Los Angeles	Consumer	Fred Hall	818-784-3036
Fishing Tackle, Boat, Travel	Mar. 18-22	San Diego	Consumer	Fred Hall	818-784-3036
* Canada Media Marketplace	Apr. 29/May 1	Los Angeles	Media	M. Campbell	213-687-7432
ASTA Western Regional Conf.	May 6-9	Regal Princess	Travel Trade	J. Gorney	213-649-3721
Ski Group'92	May 21	Phoenix	Travel Trade	E. Haas	702-456-1119
Ski Group'92	May 26	San Diego	Travel Trade	E. Haas	702-456-1119
Ski Group'92	May 27	Orange County	Travel Trade	E. Haas	702-456-1119
Ski Group'92	May 28	Los Angeles	Travel Trade	E. Haas	702-456-1119
Time of Your Life Expo	June 6-8	Los Angeles	Trvl/Trade/Cons.	D. Stone	213-216-7993
MOGO	June 30-31	Los Angeles	Incentive Tvl.	S. Adamson	404-220-2201

* Indicates participation by the Canadian Consulate General - Los Angeles (213) 687-7432

Canadian Consulate General - Minneapolis

Event	Date	Location	Target Market	Contact Person	
All-Cda Outdoor Show	Feb. 3-5	Omaha	Consumers	D. Hutchinson	414-866-2323
All-Cda Outdoor Show	Feb. 6-9	Des Moines	Consumers	D. Hutchinson	414-866-2323
Travel Canada	Feb. 18	Bismark	Travel Trade	Loberg/Verner	612-333-4641
Travel Canada	Feb. 19	Fargo	Travel Trade	Loberg/Verner	612-333-4641
Travel Canada	Feb. 20	Duluth	Travel Trade	Loberg/Verner	612-333-4641
All-Cda Outdoor Show	Feb27-Mar01	Minneapolis	Consumers	D. Hutchinson	414-866-2323
Jefferson Travel Show	Mar. 7-8	Des Moines	Consumers	JeffersonTours	515-283-2271
Greater NW Sportshow	Mar. 13-22	Minneapolis	Consumers	Gen.Sportshows	612-827-5833
Experience Canada	Mar. 16	Omaha	Travel Trade	Loberg/Verner	612-333-4641
Experience Canada	Mar. 17	Des Moines	Travel Trade	Loberg/Verner	612-333-4641
Experience Canada	Mar. 18	Rochester	Travel Trade	Loberg/Verner	612-333-4641
Experience Canada	Mar. 19	Minneapolis	Travel Trade	Loberg/Verner	612-333-4641
Tribune Trade Show	Apr. 02	Minneapolis	Travel Trade	V. Zukanoff	612-372-3879
Showcase Canada	Apr. 08	Des Moines	Mtgs/Incentive	Konstas/Verner	612-333-4641
Showcase Canada	Apr. 09	Minneapolis	Mtgs/Incentive	Konstas/Verner	612-333-4641

Canadian Consulate General - New York

Event	Date	Location	Target Market	Contact Person	
Garden State Sportsmen	Jan. 16-19	Edison	Consumer Sr.	KSK Pro.	201-968-3070
We Love New York Day	Feb. 20	New York	Mtgs/Conv.	P. Boyer	212-768-2400
World Fishing & Outdoor	Feb26-Mar01	Suffern	Consumer		
Corporate Travel World	Mar. 2-3	New York	Mtgs/Conv.	Grala Publ.	212-869-1300
Resort Show	Mar. 2-3	New York	Mtgs/Conv.	- ditto -	
National Trade Shows	Mar. 5	Cherry Hill	Travel Trade	NTS, Inc.	201-835-1340
Media Marketplace	Mar. 11-12	New York	Media	L. Gerber	212-768-2400
The Travel Marketplace	Mar. 12	Hartford	Travel Trade	J&D Expo.Prods	
Henry Davis Show	Mar. 17	Southern NJ	Travel Trade		818-999-4070
Henry Davis Show	Mar. 18	Northern NJ	Travel Trade	- ditto -	800-237-7452
Henry Davis Show	Mar. 19	Northern NJ	Travel Trade	- ditto -	
The Travel Marketplace	Mar. 17	Long Island	Travel Trade	M. Mohr	800-666-3976
The Travel Marketplace	Mar. 18	Westchester	Travel Trade	- ditto -	
The Travel Marketplace	Mar. 19	Secaucus	Travel Trade	- ditto -	
Henry Davis Show	Mar. 25	Long Island	Travel Trade		800-237-7452
Travel Expo'92	Mar. 25-26	Kingston	Travel Trade		914-246-8733
Travel 1992 Trade Show	Mar. 30	Tarrytown	Travel Trade		914-961-1018
Henry Davis Show	Apr. 06	Hartford	Travel Trade		
National Trade Show	Apr. 06	Cranford	Travel Trade	- ditto -	201-835-1340
National Trade Show	Apr. 07	NJ Shore Area	Travel Trade	NTS, Inc.	201-835-1340
Henry Davis Show	Apr. 07	Westchester	Travel Trade	NTS, Inc.	
Henry Davis Show	Apr. 08	Long Island	Travel Trade	- ditto -	
National Trade Show	Apr. 08	Cedar Grove	Travel Trade	- ditto -	201-835-1340
National Trade Show	Apr. 09	Bergen County	Travel Trade	NTS, Inc.	201-835-1340
National Trade Show	Apr. 16	Danbury	Travel Trade	NTS, Inc.	201-835-1340
Henry Davis Show	May 07	Albany	Travel Trade	NTS, Inc.	800-237-7452
Henry Davis Show	May 11	Long Island	Travel Trade		
Henry Davis Show	May 12	Queens, NY	Travel Trade	- ditto -	
Henry Davis Show	May 13	Central NJ	Travel Trade	- ditto -	
Group Leaders Shows	May 31	White Plains	Group Leaders	GLAMER	800-628-0993
Group Leaders Show	May 29	White Plains	Group Leaders	GLAMER	800-628-0993
Showcase Canada	June 18	New York City	Mtgs/Conv.	P. Boyer	212-768-2400
Meeting World	July 22-23	New York City	Mtgs/Conv.	Gralla Publ.	212-869-1300
Henry Davis Show	Sept. 22	Southern NJ	Travel Trade		800-237-7452
Henry Davis Show	Sept. 23	Queens, NY	Travel Trade	- ditto -	
Henry Davis Show	Sept. 24	Long Island	Travel Trade	- ditto -	
The Travel Marketplace	Oct. 01	Hartford	Travel Trade	M. Mohr	800-635-7469
Henry Davis Show	Oct. 12	New York City	Travel Trade		800-237-7452
Henry Davis Show	Oct. 13	Long Island	Travel Trade	- ditto -	
The Travel Marketplace	Oct. 13	Cherry Hill	Travel Trade	M. Mohr	800-635-7469
The Travel Marketplace	Oct. 14	E. Brunswick	Travel Trade	M. Mohr	800-635-7469
The Travel Marketplace	Oct. 15	Suffolk Co.,NY	Travel Trade	- ditto -	
The Travel Marketplace	Oct. 19	Nassau Co., NY	Travel Trade	- ditto -	
Henry Davis Show	Oct. 19	Long Island, NY	Travel Trade		800-237-7452
Henry Davis Show	Oct. 20	Hartford	Travel Trade	- ditto -	
The Travel Marketplace	Oct. 20	Westchester	Travel Trade	- ditto -	
The Travel Marketplace	Oct. 21	New York City	Travel Trade	M. Mohr	800-635-7469
The Travel Marketplace	Oct. 22	Secaucus	Travel Trade	M. Mohr	800-635-7469
Henry Davis Show	Oct. 27	Northern NJ	Travel Trade	- ditto -	
Henry Davis Show	Oct. 28	Northern NJ	Travel Trade	- ditto -	
Henry Davis Show	Oct. 29	Westchester	Travel Trade	- ditto -	
Henry Davis Show	Nov. 16	Trumbull	Travel Trade		800-237-7452
Henry Davis Show	Nov. 17	Windsor Locks	Travel Trade	- ditto -	

Canadian Consulate General - San Francisco

Event	Date	Location	Target Market	Contact Person	
Canada Classroom	Jan. 20-22	Hawaii	Travel Trade	R. Young	808-524-0775
RV & Travel Show	Jan. 21	Denver	Consumer Show		303-422-3444
CDN Travel Marketplace	Jan. 22	Honolulu	Travel Trade	J. Norwood	415-543-2309
Boat & Outdoor Show	Jan.	SFRAN	Consumer Show	T. Randall	415-931-2500
Hunter's Outdoor Show	Jan.	Sacramento	Consumer Show	P. Vallado	916-442-8455
Norcal Asta Travel	Jan.	SFRAN	Consumer Show	D. Forman	408-458-3478
Golden Gate Tours	Feb. 06	Moraga	Travel Trade	J. Dold	510-798-3000
Canada on Wheels	Feb. 10-13	SFRAN	Travel Trade	J. Norwood	415-543-2309
SFRAN Chronicle	Feb28-Mar1	SFRAN	Consumer Show		414-786-5600
Sacramento Bee Travel	Feb. 29	Sacramento	Consumer Show	L. Hartigan	916-321-1793
Convention Luncheon	Mar. 03	SFRAN	BusinessTravel	A. Martel	514-844-5400
CSAA/CDA Educational	Mar. 10	SFRAN	Travel Trade	B. Gross	415-573-8788
CDN Travel Trade	Mar. 18	Monterey	Travel Trade	J. Norwood	415-543-2309
Intl. Sportsmen Show	March	Denver	Consumer Show	S. Doty	206-693-3700
Events West	May 15-17	SFRAN	Consumer Show	J. Norwood	415-383-9378
Skigroup'92	June 1-2	SFRAN	Travel Trade	J. Norwood	702-456-1119
Frontier Travel	Aug. 3-4	SFRAN	Travel Trade	J. Norwood	702-648-2100
Henry Davis	October	SFRAN	Travel Trade	J. Norwood	516-868-4178
Travel Marketplace	Oct.- Nov.	SFRAN	Travel Trade	J. Norwood	818-999-4070

Canadian Consulate General - Seattle

Event	Date	Location	Target Market	Contact Person	
Int. Sportsmen's Expo	Jan. 2-5	Portland	Consumer	C. C. G.	206-443-1777
Alberta Outdoor Adventure	Jan. 14	Seattle	Travel Trade	C. C. G.	206-443-1777
Alaska Fly-Out	Jan. 15-17	Anchorage	Travel Trade	C. C. G.	206-443-1777
The Travel Show	Jan. 18-19	Seattle	Consumer	C. C. G.	206-443-1777
Seattle Sportsmen's Show	Jan. 29/Feb.2	Seattle	Consumer	C. C. G.	206-443-1777
Int. Sportsmen's Expo	Feb. 5-9	Seattle	Consumer	C. C. G.	206-443-1777
N.W. Outdoor Writers Ass'n.	Feb. 8	Seattle	Travel Trade	C. C. G.	206-443-1777
"Showcase Canada"	Mar. 3	Seattle	Travel Trade	C. C. G.	206-443-1777
"Showcase Canada"	Mar. 4	Portland	Travel Trade	C. C. G.	206-443-1777
W.S.A.E. sites & Services	April	Seattle	Travel Trade	C. C. G.	206-443-1777
J&D Tvl Marketplace	Apr. 21	Seattle	Travel Trade	C. C. G.	206-443-1777
J&D Tvl Marketplace	Apr. 22	Portland	Travel Trade	C. C. G.	206-443-1777
J&D Tvl Marketplace	Apr. 23	Spokane	Travel Trade	C. C. G.	206-443-1777
Canada Media Marketpl.	Apr. 29/May1	Los Angeles	Travel Trade	C. C. G.	206-443-1777
J&D Tvl Marketplace	Nov. 4	Portland	Travel Trade	C. C. G.	206-443-1777
J&D Tvl Marketplace	Nov. 5	Seattle	Travel Trade	C. C. G.	206-443-1777
J&D Tvl Marketplace	Nov. 6	Spokane	Travel Trade	C. C. G.	206-443-1777

* Indicates participation by the Canadian Consulate General - Seattle (206) 443-1777

Canadian Consulate General - Washington

Event	Date	Location	Target Market	Contact Person	
* Joint Promo - QC/Montreal	Feb. 5	Embassy	Ass. Executives	Embassy	202-682-7706
* Prince of Fundy	Feb. 27	Embassy	Group Leaders	Embassy	202-682-7704
Vacation & Tvl Showcase	Mar. 14-15	Virginia Beach	Travel Trade	CI Travel	804-627-8000
* Eastern Travel Assn.	Mar. 16-18	Allentown	80% of Top Retail	A. Moeler	215-759-9697
* Joint Promo-Vancouver	Mar. 26	Embassy	Assn. Executives	Embassy	202-682-7706
* Passport to the World	Apr. 2	BWI Airport	Travel Agents	D. Molner	202-682-7704
* Ottawa Trade Show	Apr. 9	Embassy	Tour Operators	Embassy	202-682-7704
* Joint Promo-Ottawa	Apr. 12	Embassy	Assn. Executives	Embassy	----------
* Travelogue & Tvl Resources	Apr. 28	Embassy	Travel Planners	Embassy	202-682-7704
* Group Leaders of Am. Inc.	April	Richmond	Group Leaders	R. Conrad	202-682-7704
* Springtime in the Park	May	Washington	MC&IT	Embassy	202-682-7704
* Group Leaders of Am. Inc.	May 20	Baltimore	Group Leaders	R. Conrad	202-682-7704
* Group Leaders of Am. Inc.	May 22	Philadelphia	Group Leaders	R. Conrad	202-682-7704
* C/Air & Embassy Seminar	May 28	World Bank	Corporate Accounts	Embassy	202-682-7704
* Tauck Tours	June	Norfork	Group Leaders	Embassy	202-682-7704
* Carlson Tvl-Ed. Seminar	Sept.	Embassy	Corp. Tvl. Planners	Embassy	202-682-7704
* Group Leaders of Am. Inc.	Oct. 21	Washington	Group Leaders	Embassy	202-682-7704
* Canada Ski Show	Nov. 5	Embassy	Ski Clubs	Embassy	202-682-7704
* Canada's Call	Nov.	Washington	MC&IT	Embassy	202-682-7706

* Indicates participation by the Canadian Embassy - Washington (202) 682-7706

Canadian Consulate General - Dusseldorf

Event	Date	Location	Target Market	Contact Person
Caravan,Motor&Tourism	Jan. 18-26	Stuttgart		
Caravan,Bota&Travel	Feb. 1-9	Munich		
Reisen Hamburg	Feb. 15-23	Hamburg		
Intl.Tourism Bourse	Mar. 7-12	Berlin		

Canadian High Commission - London

Event	Date	Location	Target Market	Contact Person
Activity Breaks Show	Jan. 2-4	London		
Holiday & Travel Fair	Jan. 3-5	Birmingham		
Holidayworld'92	Jan. 9-10	Belfast		
Northern Holiday	Jan. 10-12	Manchester		
Bristol Holiday	Jan. 17-19	Bristol		
Holiday World	Jan. 22-26	Dublin		
Irish & Intl Holiday	Jan30-Feb2	Cork		
Irish & Intl Holiday	Feb. 21-23	Galway		
Daily Mail Ideal Home	Mar12-Apr5	London		
Ideal Holiday Show	Mar. 19-22	London		
National Angling	Apr. 4-5	London		
National Angling	Apr. 16-17	Doncaster		
The World of Golf	Apr. 23-26	London		
Scotish Ski & Winter	October	Glasgow		
Birmingham Intl Ski	Oct. 1-4	Birmingham		
Natl Daily Mail Ski	Oct. 8-11	Manchester		
Daily Mail Intl Ski	Nov. 1-8	London		
World Travel Market	Nov. 16-20	London		
Scotish Passenger	December	Glasgow		

Canadian Embassy - Paris

Event	Date	Location	Target Market	Contact Person
Rop Resa	Février	Paris	Professionnel	
SMTV	Mars	Paris	Prof/G.Public	
Mahanna	Février	Lyon	Prof/G.Public	
Tourissima	Février	Lille	Prof/G.Public	
Mahanna	Février	Lyon	Prof/G.Public	
Expo-Langues	Février	Paris	Prof/G.Public	
Ecoprisemars	Mars	Paris	Professionnel	
MTC	Mars	Grenoble	Prof/G.Public	
Aire-Loisirs	Mars	Marseille	Grand Public	
Foire de Paris	Maí	Paris	Prof/G. Public	
Top Resa	Septembre	Deauville	Professionnel	
Touri-First	Septembre	Paris	Professionnel	
Mitcar	Septembre	Paris	Prof/G.Public	
Servi-Congres	Décembre	Paris	Professionnel	
Neige et Soleil	Octobre	Paris	Prof/G.Public	
Atelier Cda	Début Déc.	Paris		

Canadian Embassy - Tokyo

Event	Date	Location	Target Market	Contact Person
World Travel Fair	December	Tokyo	Consumer	
JATA Congress	Late Nov.	Tokyo		
Tour Expo	Late Apr.	Osaka	Consumer	
KANATA,92	Early Dec.	Tokyo	Trade	
Various Travel Trade	Sept.-Mar.		Travel Trade	